DOCUMENT RESUME

ED 228 775 EC 151 621

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TITLE Resource Specialist Training Resources. Volume II.
INSTITUTION California State Dept. of Education, Sacramento. Special Education Resource Network.
SPONS AGENCY California State Dept. of Education, Sacramento. Div. of Special Education.; Sacramento County Office of Education, Calif.
PUB DATE 82
NOTE 133p.; For related documents, see EC 151 620-622.
PUB TYPE Guides - Non-Classroom Use (055) -- Tests/Evaluation Instruments (160)

EDRS PRICE MF01/PC06 Plus Postage.
DESCRIPTORS Attitude Change; *Change Strategies; Communication Skills; *Disabilities; *Educational Change; Elementary Secondary Education; Group Experience; Principals; Resource Staff; *Resource Teachers; Staff Role; *Teamwork
IDENTIFIERS California

ABSTRACT

Materials for special education resource specialists in California on implementing a team approach and facilitating change are presented as the second of four volumes. The first section includes a description of the resource specialist program; the interaction between the resource specialist and the principal; the roles of the resource specialist, principal, program specialist, and resource specialist aide; and the teamwork responsibilities of the resource specialist and aide. The second section contains a list of conditions that facilitate change; a form for rating readiness for change for six clusters (e.g., accessibility of resources and support, and skill in collaborative group work); a list of reasons that human resources are important to managers; a reading list on self-directed management; a description of A. Maslow's need hierarchy; and management guidelines. Thirteen pages of overhead transparencies are appended. Additional appendices include activities excerpted from "Handbooks of Structured Experiences for Human Relations Training" (Pfeiffer and Jones). These activities include the following topics: communications stress management, group dynamics, closure debriefing, individual differences, communication group processes, communication problem solving, and personal development. Rating forms are included in the activity units. (SEW)

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RESOURCE SPECIALIST TRAINING RESOURCES

VOLUME II

Developed for the

SPECIAL EDUCATION RESOURCE NETWORK

By

Ruth Wharton Brown

SERN Resource Service Center

Sacramento County Office of Education

Coordinator: Steve Johnson

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II

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APPENDIX:

OVERHEAD TRANSPARENCIES OH-1 TO OH-13

Role Definitions: Resource Specialist/Aide/Principal/Program Specialist

CONTENT	ACTIVITY	MEDIA	HANDOUTS
Audience: Principals, Resource Specialist, Aide, Program Specialist 1 full-day workshop Request attendance of Principal, Program Specialist, and Aide for presentation of topics re: their role as members of the team. Present an overview of the role as mandated by SB 1870. Differentiate between role of Resource Specialist and LDG teachers and Resource Rooms. Discuss competencies developed by CTPL. Present update on certification and assessor panels. Provide article "The Human Side of Management" to teams before actual training for reading.	System Problems: A Diagnostic Activity pp 20-21 Prepare inservice that team will present to staff at local school or district site. Make available other materials from training package such as Transparencies and fact sheet. Encourage Principals' leadership in this presentation.	Resource Specialist Role OH-3 to 11 OH-1 & 2 Resource Specialist/ Aide Team	Role descriptions acti sheets for Aides on Be and Becoming

Continued--Resource Specialist--Principal

CONTENT	ACTIVITY	MEDIA	HANDOUTS
Article: "Diagnosing Schools' Readiness for Change" Recommended for use with audiences of new implementors			
Lecturette: Maslow's Need Hierarchy	Discussion and audience input reflecting or identifying past events or district situations	OH-12 Pyramid--Maslow's Need Hierarchy	

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RESOURCE SPECIALIST PROGRAM

The goal of the Resource Specialist Program is to provide instructional planning, special instruction, tutorial assistance, or other services to those individuals whose needs have been identified by the IEP Team as being exceptional. This program is to be coordinated by a Resource Specialist, who is a special education teacher with advanced training in the education of individuals with exceptional needs.

The Resource Specialist has an instructional, coordinating and consuling function at the local school level. With the assistance of an instructional aide, the Resource Specialist will provide direct instruction under an instructional plan developed by the IEP Team. Instruction by the Resource Specialist is defined as working with individuals on a one-to-one or small group basis for specified periods of time on goals and objectives described in the written instructional plan. This help may be given either in a resource room or in the regular classroom. An expansion of service provided by the Resource Specialist is defined as help given to an individual on a regular basis through the resource aide and/or the regular classroom teacher, i.e., special curriculum materials that have been developed or modified for a specific student by the Resource Specialist and used by the resource aide and/or the regular classroom teacher. The active caseload of the Resource Specialist is presently set at 28 students, and those individuals must be assigned for a majority of the school day to a regular classroom teacher. The Resource Specialist snall not be utilized as a regular classroom teacher nor have specific individuals assigned to him or her for a majority of the school day.

The provision of consultation and support services to teachers is seen as a primary function of the Resource Specialist Program. Consultation may be in such areas as identification and assessment procedures, classroom environment, behavior management, interpretation of educational or curriculum modification. Consultative services may also be provided to parents to enhance their understanding of the individual's exceptional needs.

The Resource Specialist will operate out of a room which will serve as a resource center, supplied with appropriate instructional materials and equipment for use in direct instructional service to individuals and in demonstration for regular class teachers.

THE TEAM CONCEPT

RESOURCE PROGRAMS-
A COOPERATIVE VENTURE

RESOURCE PROGRAMS ARE A SERVICE FOR STUDENTS WHO BENEFIT FROM THE MAJOR PART OF THE REGULAR CURRICULUM, BUT REQUIRE SOME SPECIAL ASSISTANCE TO HELP ALLEVIATE THEIR LEARNING PROBLEMS. THEIR SUCCESS IS RELATED TO THE COOPERATIVE EFFORTS OF THE GENERAL EDUCATOR AND SPECIAL EDUCATOR.

RESOURCE PROGRAMS GENERALLY ARE:

- DESIGNED TO REMEDIATE SPECIFIC ACADEMIC PROBLEMS OR SKILL DEFICIENCIES ESSENTIAL FOR SUCCESS IN THE REGULAR PROGRAM.
- EVALUATED ON THE ABILITY OF THE STUDENT TO FUNCTION IN THE REGULAR PROGRAM.
- SERVING STUDENTS BETWEEN 30 MINUTES AND TWO HOURS PER DAY.
- AT THEIR MAXIMUM LOAD WITH 15-20 STUDENTS DEPENDING ON STATE REGULATION.
- USERS OF REGULAR CLASSROOM MATERIALS WHERE POSSIBLE TO PROMOTE CONTINUITY, BUT SUPPLEMENT THEM WITH SPECIAL MATERIALS.
- NOT RESPONSIBLE FOR MAJOR INSTRUCTION.
- NOT EFFECTIVE IN ALTERING BEHAVIOR PROBLEMS THAT OCCUR IN THE REGULAR CLASSROOM.
- NOT LONG RANGE SERVICES FOR STUDENTS WHO NEED A BASIC PROGRAM DIFFERENT FROM THE REGULAR CURRICULUM.

REPRINTED WITH PERMISSION FROM COUNCIL FOR EXCEPTIONAL CHILDREN, EXCEPTIONAL CHILDREN, VOLUME 43, NO. 1, SEPTEMBER 1976, P. 54.

RESOURCE PROGRAMS ARE MOST SUCCESSFUL WHEN:

- ACADEMIC PROBLEMS OR SKILL DEFICIENCIES ARE SPECIFICALLY DEFINED.
- OUTCOMES FROM THE RESOURCE PROGRAM ARE AGREED UPON BY THE RESOURCE TEACHER AND THE GENERAL EDUCATOR.
- TIME IS AVAILABLE FOR THE RESOURCE TEACHER TO OBSERVE OR TO DEMONSTRATE METHODS AND MATERIALS IN THE REGULAR CLASSROOM.
- STRATEGIES FOR CIRCUMVENTING THE ACADEMIC PROBLEM OR SKILL DEFICIENCY IN THE REGULAR PROGRAM ARE DEVELOPED AND IMPLEMENTED.
- STUDENT PROGRESS IS REVIEWED ON A PLANNED BASIS BY THE GENERAL EDUCATOR AND THE RESOURCE TEACHER.
- RESOURCE PROGRAM SCHEDULING AVOIDS REMOVING THE STUDENT FROM REGULAR CLASSROOM EXPERIENCES IN WHICH THERE IS STUDENT INTEREST OR SUCCESS.

ROLE OF THE PRINCIPAL

It was the general agreement of those educators who framed the California Master Plan for Special Education that, in most cases, individuals with exceptional needs could best be served if decisions concerning their educational programs could be made at a local level. At the fulcrum of this decision-making process is the on-site administrator.

Under the California Master Plan, the school principal is given more autonomy and responsibility for the program placement and development for handicapped pupils than he or she has previously had. It is felt that the principal and his/her staff, who are most familiar with a student's emotional and/or educational problems, can best determine the student's needs.

The organization, in terms of special education, within which the school principal will operate under the Comprehensive Plan, may have to undergo some modification. Assessment will be carried out by a school team located at each school site and chaired by the principal or his or her designee. This team will also be responsible for the formulation of each handicapped student's written instructional plan or IEP. In fact, all special education services provided at a particular school may be coordinated by the school's team and the Resource Specialist.

The need for dynamic leadership from the principal can readily be seen. It is through his or her coordinative skills that proper program placement and instructional planning can be provided for all special education students.

1. COORDINATING ROLES AND RESPONSIBILITIES

The principal or his or her designee may coordinate all special education services that are provided at the school site, as well as all designated instruction and services which may be requested from the district or county levels.

2. ADMINISTRATIVE ROLES AND RESPONSIBILITIES

The principal or his or her designee may chair all meetings of the School IEP Team and will insure that those individuals whose services are required, plus any personnel who may have relevant input to the assessment process, are notified of dates and times of meetings.

The principal or his or her designee may also be the primary agent through whom referrals are made. These may originate from either within the school or from the community, but it is essential that the principal be aware of the source of and reason for the referrals. Beyond this, it is his or her responsibility to make sure that all referrals have been acted upon by the staff.

It is also his or her responsibility to make certain that due process procedures are strictly adhered to. This must include written notification to parents of impending assessments and an invitation to them to attend meetings which deal with program development for their child.

While some of the mechanics of filling out data reporting forms for the district and county offices may be carried out by members of the Team, it is the on-site administrator's task to insure that the forms are completed and forwarded within established timelines.

Finally, and perhaps most importantly, the principal or his or her designee should facilitate inservice activities at his or her school site which deal with special education in general and provisions of the Comprehensive Plan in particular.

THE PRINCIPAL AND THE RESOURCE SPECIALIST

Building principals will assume direct responsibility for introducing and explaining the Resource Specialist program to faculty members and parents. In order to do a successful job, the principal must be intricately involved with the legal and humanitarian needs of Special Education. Furthermore, he or she must be convinced of the value of the Resource Specialist program.

It is the principal who sets the tone for the program, defining it in terms of the model most suited to his or her particular school. When Resource Specialists are assigned to the program, the principal should introduce them to the staff, explain their duties, and define the specific procedures for identifying and referring students for possible placement in the Resource Specialist program. At the same time, the principal must set forth the duties and membership make-up of the IEP Team for the school.

This introductory meeting should be carefully planned, since many Resource Specialists will have many concerns regarding the operation of the school program. Their questions must be anticipated and answered with empathy and understanding. Many concerns will be alleviated by the knowledge that other support personnel will provide direct service to the Resource Specialist. The consultative aspect of the role should be stressed so that teachers are aware of the presence of a Special Education expert within the school at all times.

In addition to this introductory meeting, on-going inservice must be planned. The Resource Specialist is the logical choice for presenting these programs since he or she is most familiar with the concerns of teachers and can provide assistance in areas in which they demonstrate specific needs.

As the Resource Specialist program develops, the principal should provide continuous support. Since this person will require a large amount of time to plan and present inservices, consult with teachers and staff members, prepare individualized materials, and diagnose students' difficulties, principals must allow them to pursue a flexible schedule wherever possible.

Perhaps the most critical responsibility of the principal is that he or she remain determined that the program will not be used as a dumping ground for every student who doesn't fit the concept of "average".

In his or her position as leader of the school, the principal will be the final decision-maker in matters concerning the Resource Specialist program. Therefore, the principal should be continually aware of what is happening in the program. Frequent visits to the room for a first-hand look and discussions with the Resource Specialist are necessary. Information gathered in this manner will allow the principal to knowledgeably answer questions about the program at any time.

If the Resource Specialist receives consistent support from the principal and directly from the administration, the program will have a solid foundation. It then becomes the duty of that person to make the program succeed at the "grassroots" level.

PROGRAM SPECIALIST

The role of Program Specialist is new under the Master Plan; this position was established to provide expert consultation to Resource Specialists, special class teachers, administrators, and others involved in program planning for handicapped individuals. A Program Specialist shall be a credentialed special education person with advanced training in the education of individuals with exceptional needs and with specialized knowledge in one or more of the four major areas of the classification system: Communicatively Handicapped, Physically Handicapped, Learning Handicapped and Severely Handicapped. The Program Specialists will provide coordination of program planning and curricular resources, assess program effectiveness, and participate in inservice training and program development for individuals with exceptional needs in the geographic and handicap expertise area to which he/she is assigned.

The responsibilities of the Program Specialist may include:

1. Reviewing program plans developed by local or district Teams and assisting where indicated in refining or supplementing those plans, and providing curricular resources when necessary.

2. Serving as a member of the IEP Team by assisting in the assessment of exceptional children, coordinating and/or writing of instructional plans developed by the Team, monitoring the implementation of these plans and recommending changes in the plans when indicated.

3. Providing consultative services and resource information regarding individuals with exceptional needs to special education teachers, Resource Specialists and other instructional personnel, and to parents or guardians of those individuals with exceptional needs.

4. Facilitating the placement of children in non-public school programs, and monitoring the progress of students placed in residency at the State schools.

5. Coordination and/or participation in inservice training bringing research, program development, and innovation of special methods and approaches in his/her area of expertise.

6. Coordinating public education services and community resources, with district administrators, to provide the most effective educational programs for individuals with exceptional needs and their parents.

7. Participating in monitoring pupil and program progress on a regular basis.

THE RESOURCE SPECIALIST AIDE

The basic role of the aide is to increase the likelihood that each student will receive the necessary academic assistance and other support which would facilitate his success in attaining the goal of full-time placement in the regular classroom. An aide may work with students on a one-to-one basis or in small groups in the Resource Specialist room or in the student's classroom

The duties of the aide will vary depending on:

1. The organization and structure of the Resource Specialist room or the regular classroom.

2. The experiential background and training of the aide.

3. The needs of, as well as the number of, students in the room.

In facilitating instruction, the aide should begin by establishing rapport with the students. The Resource Specialist must introduce the aide as an assistant to whom students should respond to directions and requests the same as they would to a regular classroom teacher or other staff.

With one or more aides as assistants, the activities of the day would more than likely flow smoothly and afford the implementation of the Resource Specialist role as mandated in Senate Bill 1870. Through the assistance from the aide, the Resource Specialist should have opportunity to observe students in regular classroom settings, schedule conferences with parents and staff as needed, and, in some cases, coordinate the activities of the Individualized Education Program. An equal amount of time is necessary for assessment, instructional planning, monitoring pupil progress and assisting in providing inservice activities.

Ideally, an aide is in a flexible situation in which roles and duties are worked out between the Resource Specialist and the aide. As they work together as a team, the aide should begin to anticipate needs of both Resource Specialist and students and provide assistance as needed.

The Team

Resource Specialist & Resource Specialist Aide

POINTS TO REMEMBER

1. The Resource Specialist, aide and volunteers are a team.
2. The Resource Specialist leads the team and accepts the responsibilities for all actions in tne program.
3. The Resource Specialist prepares the pupils for working with another adult.
4. The Resource Specialist helps the aide gain status in the eyes of the students by:
   a. The confidence that the Resource Specialist displays in the aide
   b. By utilizing his/her strengths and special talents.
5. The Resource Specialist sets the pace, tone and attitude of the program.
6. The Resource Specialist should work on a consistent approach with the students.
7. The Resource Specialist should make sure the aide knows exactly what to do in a discipline situation so consistency can be maintained.
8. The Resource Specialist should provide background reading material on the type of learning disabilities the aide will encounter.
9. The Resource Specialist is responsible for instruction; the aides may reinforce after the concept has been introduced.
10. The Resource Specialist or teacher is responsible for developing a positive, organized classroom. Do not be a complainer to your aide. Further strides are made when the positive is emphasized even if you have to dig to find a point.
11. The Resource Specialist should develop a chain of command and a way of airing problems.
12. The Resource Specialist should be alert to troubleshoot possible problems.
13. The Resource Specialist should discuss with the aide the type of rapport they wish them to develop with their students--how professional, how to be addressed, type of clothing.
14. The Resource Specialist should be careful not to use the aide as a "GO FOR".
15. The Resource Specialist should acquaint the aide with the IEPs of the students.
16. The Resource Specialist should familiarize the aide with the latest terminology or educational jargon.

POINTS TO REMEMBER (Continued)

17. The Resource Specialist should take the responsibility for making the aide feel welcome at the school and make the necessary introductions.

18. The Resource Specialist should find out from the aides' strengths and weaknesses and build on these areas until they are able to assume other responsibilities.

19. The Resource Specialist should be alert to the effectiveness of the aide with students. If the aide is not effective, use their talents in other ways to help.

POINTS TO REMEMBER FOR THE AIDE

1. You and other program staff work together as a team, but the Resource Specialist leads the team.

2. Remember each Resource Specialist has his/her own ideas, routines and approaches -- do not compare.

3. It is important to be consistent with the Resource Specialist's approach with children. Find out how discipline is to be handled.

4. Remember it is not your job to evaluate a child's progress at school. Tactfully handle parents who ask questions and refer them to the Resource Specialist.

5. Set a good example for the students in conversation and dress. Do not become "buddies". Your relationship with the students can be friendly but professional.

6. If you have questions about preparing material or working with children, take them to the teacher immediately.

7. It is important to represent to children an organized, supportive classroom with a positive atmosphere.

8. Be open to constructive criticism.

9. Don't be afraid to ask questions.

10. Use your weekly conference time to express yourself freely, yet professionally.

CHECKLIST FOR THE AIDE THE FIRST WEEK

1. Become familiar with employment procedures

_____ Signing in and out
_____ Reporting absence
_____ Completing time cards
_____ Legal status of aide

2. Become familiar with school site and personnel

_____ Principal/vice principal
_____ Counselors
_____ Nurse
_____ Secretary
_____ Custodian
_____ Playground area
_____ Cafeteria
_____ Other areas like the library, etc.
_____ A.V. delivery schedule
_____ Supply room
_____ Lounge
_____ Work room/how to run machines

3. Become familiar with your assignment

_____ Physical characteristics of the age group
_____ Emotional characteristics
_____ Other specific characteristics
_____ What is considered positive and what is considered negative behavior
_____ Names of the students and persons with whom you are working

FACILITATING CHANGE

CONDITIONS WHICH FACILITATE CHANGE

1. Persons tend to change when they have particpated in the decision to change.

2. Persons tend to change when the rewards for change exceed the pain of change.

3. Persons tend to change when they see others changing, particularly when the change direction is supported by valued persons.

4. Persons tend to change more readily in an environment free from threat and judgement.

5. Persons tend to change to the degree they trust the motives of the person or persons attempting to induce change.

6. Persons tend to change more readily when they have the competencies, knowledge or skills required by the change.

7. Persons tend to change more readily if they are able to influence reciprocally the person or persons who are attempting to influence them.

8. Persons tend to change to the degree that they see the change has been successful, especially if they are able to gather data for themselves.

9. Persons tend to change either in a series of small steps or as a total change in their way of life.

10. Persons tend to maintain change as the change is supported by their environment.

11. Persons tend to maintain change if there is a public commitment to the change.

D I A G N O S I N G

A S C H O O L ' S R E A D I N E S S

F O R C H A N G E:

What to Look for

When Starting an Innovation

by: Warren E. Bell,
Spencer H. Wyant and Richard A. Schmuck

Edited by: John McCalley, Director,
Central California Facilitator Project

This new booklet distinguishes three levels of a school's social system, and examines resistance to change, conditions of readiness, collection of diagnostic data, and much more.

Price: $12.50

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CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 1: ACCESSIBILITY OF RESOURCES AND SUPPORT

	F	UNF	DK	DNA
1.1 Extent and kind of technical knowledge needed to implement a change.				
1.2 Availability of technical knowledge within the school.				
1.3 Accessibility of technical knowledge and expertise outside the school.				
1.4 Availability of financial resources.				
1.5 Support from key administrators in the district.				

DIAGNOSTIC DATA:

CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 2: INTERNAL PRESS FOR CHANGE

	F	UNF	DK	DNA
2.1 Proportion of individuals dissatisfied with the present situation.				
2.2 Proportion of individuals valuing the proposed target.				
2.3 Proportion of individuals who have confidence that the proposed change will bring benefits.				

DIAGNOSTIC DATA:

CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 3: STABILITY OF THE STAFF UNDERGOING CHANGE

	F	UNF	DK	DNA
3.1 Proportion of turnover of membership of the staff.				
3.2 Commitment of key administrators to remaining in current positions for the duration of the change.				
3.3 Proportion of individuals attempting other changes.				
3.4 Proportion of the staff experiencing stress due to the complexity of the school organization.				

DIAGNOSTIC DATA:

CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 4: SKILL IN COLLABORATIVE GROUP WORK

	F	UNF	DK	DNA
4.1 Group skill in communicating accurately.				
4.2 Group skill im making clear decisions.				
4.3 Group skill in conducting effective meetings.				
4.4 Group skill in working effectively with diverse views, opinions, and values.				
4.5 Group skill in solving problems.				

DIAGNOSTIC DATA:

CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 5: NORMS SUPPORTING COLLABORATIVE GROUP WORK

	F	UNF	DK	DNA
5.1 Norms supporting third-party helping.				
5.2 Norms supporting collaboration.				
5.3 Norms supporting continued communication in emotional situations.				
5.4 Norms supporting perseverance in group tasks.				
5.5 Norms supporting individual disclosure of feelings, worries, or frustrations with the task.				

DIAGNOSTIC DATA:

CONDITIONS FOR READINESS

Use this key to rate each of the conditions.

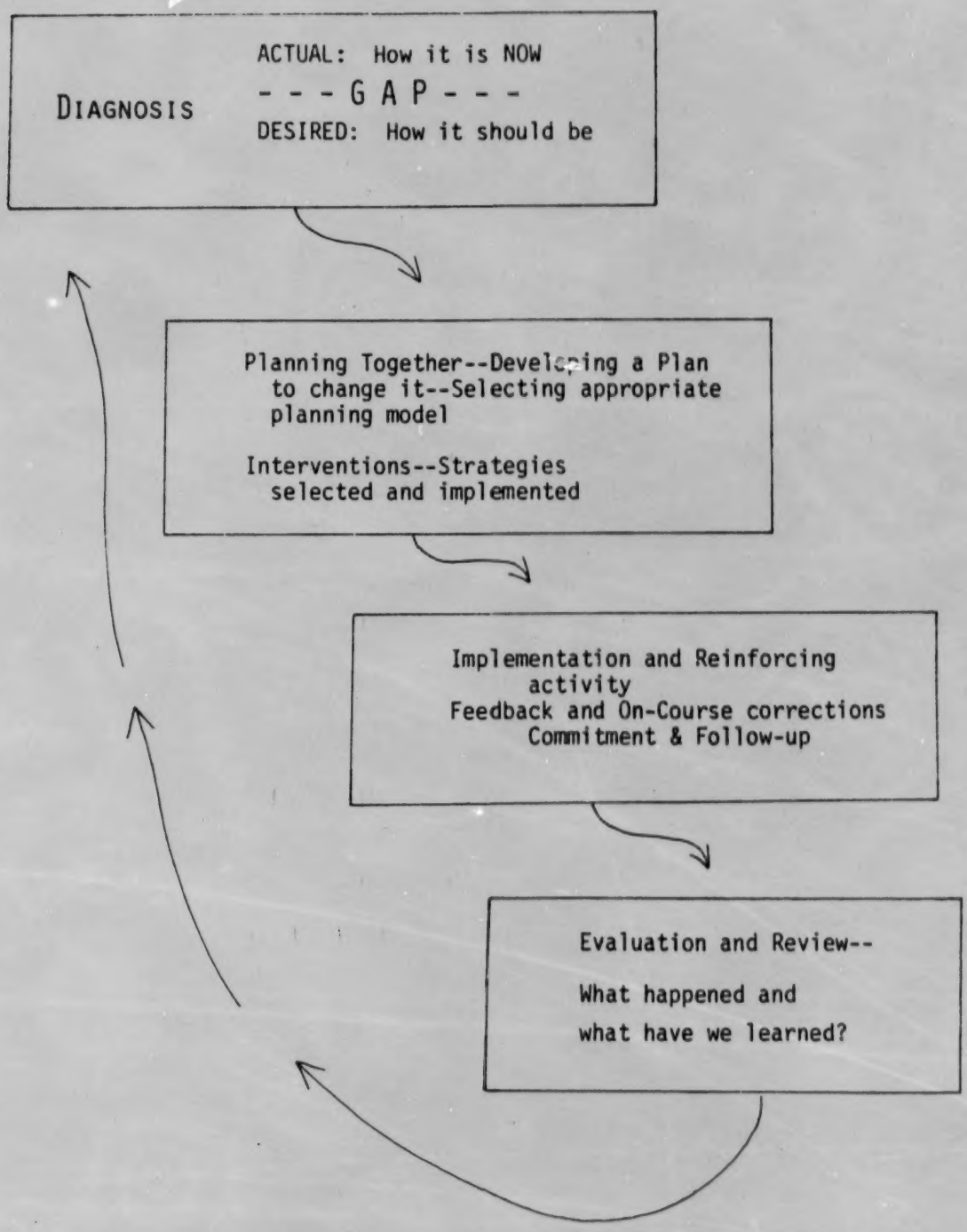
F = Favorable
UNF = Unfavorable
DK = Don't Know
DNA = Does not apply

CLUSTER 6: SPIRIT OF RISK-TAKING

	F	UNF	DK	DNA
6.1 Proportion of individuals who are willing to risk new action on behalf of the school.				
6.2 Willingness of key administrators to make reciprocal changes in their behavior.				
6.3 Presence of charismatic leadership.				
6.4 Proportion of individuals willing to undergo training in new skills and behavior.				
6.5 Proportion of individuals experiencing stress, anxiety, or threat, regardless of the source.				

DIAGNOSTIC DATA:

ACTION RESEARCH MODEL


DIAGNOSIS
ACTUAL: How it is NOW
- - - G A P - - -
DESIRED: How it should be
Planning Together--Developing a Plan to change it--Selecting appropriate planning model
Interventions--Strategies selected and implemented
Implementation and Reinforcing activity
Feedback and On-Course corrections
Commitment & Follow-up
Evaluation and Review--
What happened and
what have we learned?

A LEARNING LOG

by Maurice L. Pettit

WHAT I LEARNED FROM THIS EXPERIENCE: (describe briefly)	I MUST CONTINUE DOING THESE THINGS:	I MUST START DOING THESE THINGS:	I MUST STOP DOING THESE THINGS:	MY FRIENDS CAN HELP ME LEARN IF THEY:

POSSIBLE SURVEY QUESTIONS

Taken from Maurice Pettit's "Action Research" Model for Organizational Development

ABOUT CLIMATE:

1. What obstacles are keeping my project/division from reaching its goals?
2. What changes need to be made to help my project/division to reach its goals more efficiently?
3. How will these changes affect me personally?

ABOUT INTERRELATIONSHIPS:

1. What am I doing well to help my project/division reach its objectives?
2. What are my co-workers doing well to help my project/division reach its objectives?
3. What am I doing which hinders my project/division from reaching its objectives?
4. What are my co-workers doing which hinders my project/division from reaching its objectives?

ABOUT INDIVIDUAL GROWTH:

1. What are others doing that I also could start doing? (LEARNING)
2. What am I doing that I should stop doing? (UNLEARNING)
3. What have I been doing that needs to be brought up to date? (RELEARNING)

TDK: tdk 14 July 78

THE HUMAN SIDE OF MANAGEMENT - PEOPLE MAKE "SYSTEMS GO"

Public Education is in a battle for survival. We are confronted almost daily with demands from legislators, board members, employees, parents, taxpayers, the business community, the minority community and others to improve education and to make it more responsive to all segments of the community. Because of these demands we must prove that we are doing a good job by making visible the results accomplished as they relate to the dollars invested. We live in an era of changing times and increasing complexity. Decisions get tougher every day. The demands for more effective results will be with education for years to come.

The school district often is the largest and, in many ways, the best managed business in town. We have accomplished much in education that we can look back on with pride, but we can't be satisfied with the past. We must prepare for a rapidly changing, complex and demanding future.

The most important and most costly resource in any educational organization is people. People make "systems go". If we accept these assumptions about people, the question we might well ask is, "What are the implications for managers in the educational enterprise?"

Some of the major implications for managers in the educational organization are as follow:

(1) We depend on people in accomplishing results and, therefore, need their commitment to the goals of the organization. We must accept the fact that authority never fully equals responsibility. The manager at any level in an organization is held accountable for things that he cannot directly control even if he has the formal right to do so.

(2) True and sustained commitment is fostered in an organization that allows people to own a "piece of the action". By that I mean people are most productive when they have full freedom to plan and carry out their jobs. They will work more effectively toward accomplishing goals when they have participated in the development of the goals.

(3) Rewards, punishments, and authority cannot in themselves lead to commitment on the part of the people. We can force people to comply with our orders, but we cannot force them to act with commitment, independence or creativity.

(4) The organization that does not allow people to "own a piece of the action" and depends primarily on authority in seeking results forces people to either be "house-broken yes men or women" or to apply their creativity and ingenuity toward "beating the system".

(5) The effective manager realizes that his or her success and the success of the organization lies in the ability and accomplishment of other people rather than doing everything oneself. In most situations where a manager plays the role of the "answer man" with a subordinate, he deprives that person of a potential growth experience. He also increases the demands on his time, resulting in less time being devoted to his job as a manager.

(6) The effectiveness of the manager could be greatly increased if he or she assumed the role of a coach and counselor. Ask yourself the following questions and plot a course of action for your personal improvement: How much time do I spend in coaching and counseling activities with my people? Do I allow them work opportunities that require stretch beyond the everyday operating aspects of their jobs? Do I allow people to formulate their own solutions to problems which frequently may not be the same solutions I might have identified?

If you can accept these management implications about people, you might well ask the question, "What are the alternative ways of allowing people to make systems go?" I submit that there are many alternatives available to us such as Management by Crisis; Management by Manipulation; Management by Detail; Management by Control and Coercion, and others.

I feel there is an alternative that I suggest we in public education explore. I call this approach "self-directed management". The question might be asked, "What is self-directed management and what is in it for me?" Perhaps the best way to answer the question would be to first explain the basic parts of self-directed management and then explore the major benefits of this style of management.

There are six questions that need to be asked in implementing self-directed management, as follows:

(1) Why do I exist in this organization?

The process of implementing self-directed management begins with defining the reason for the existence of your job. The manager here is confronted with determining how his job contributes to the achievement of organization goals. Defining the reason for existence requires that we move from the traditional look at the things we do (activities) as outlined in a job description to the outcomes we must accomplish (results).

(2) What are the critical or most important areas in which I must accomplish results?

The identification of these areas requires a focus on the major results or outcomes expected of each manager. The manager asks himself the question, "If my position were eliminated, what would not be accomplished?"

(3) How will I know and how can I measure success in achieving desired results in each area?

Skill in selecting the most important indicators of success is not something that will be acquired in a matter of days, weeks, or months, but is a crucial step in implementing self-directed management. A desired outcome or result will be structured for each performance indicator. The identification of performance indicators should stress quality rather than quantity. Those who have experienced success in implementing this style of management have found there are usually three or four important or critical performance indicators for each result area.

(4) What are the specific results that will be accomplished in order to progress within each result area?

Results if properly stated should describe a measurable condition that will exist when they are accomplished. Results should not be cast in cement. If conditions change, then perhaps the desired results should be revised, but this does not mean that the outcome should be revised just because it will be difficult to achieve. Outcomes should be results-oriented, measurable, challenging and realistic. The manager should not prepare the objectives for the subordinate but assist him by reacting to what he has prepared. The actual preparation of objectives requires at least three or four sessions between manager and subordinate.

The manager might ask subordinates, preparing their objectives, such questions as: Does the objective require sufficient accomplishment for the manager during the measuring period? Is the objective too low - can the district operate effectively with this level of results? Is the objective practical and attainable? Is the objective clearly stated in terms of the result, the measuring period and the method of measurement to be used? Is the objective compatible with the organization's goals?

(5) What specific actions must I take in order to accomplish each objective?

The work plan should include a deadline date for each action identified. If properly prepared, the work plan provides the manager with target dates that allow him to monitor his progress in accomplishing objectives. The emphasis is on self-direction and self-control rather than externally imposed controls.

(6) How can I be sure that my performance is on schedule?

The major parts of a feedback system involve the manager assuming the role of a coach and counselor who assists his subordinates in accomplishing the objectives agreed to and should consist of monthly progress reports, quarterly progress reports and an annual performance review of the degree of success in accomplishing results. It is important to note that the manager and the subordinate have agreed to what success will look like and that performance appraisal is based on results rather than other things such as appearance and personality. The purpose of the monthly progress report is one of self appraisal by the manager in order to determine progress in achieving each objective. If progress in achieving the objectives deviates significantly from target, the manager should call that to the attention of his boss in order that they review and determine appropriate corrective action.

The quarterly progress report should be prepared by the manager and reviewed with his boss every three or four months. This session should include a discussion of progress made to date, major problems faced, possible ways of removing obstacles that exist and a review of how realistic the objectives are at that point in time.

The annual performance review session involves both the manager and his boss in looking at the degree of success in accomplishing objectives. The session should focus on results that have been accomplished and provide a beginning point for the establishing of objectives for the next measuring period.

It should be emphasized that the process of implementation should not be one of the Manager preparing the parts of this approach for the subordinate. If this is done, commitment by the subordinate will not exist in that he or she had no part in the preparation of the expected results.

Although this approach to management is not an easy one, the time invested is well worth the potential results.

In looking at the benefits or answering the second part of the question, "What is in it for me?", I have seen a number of advantages to this style of leadership over the more authoritarian or traditional approaches to management. Some of the major benefits are:

(1) Encourages individual initiative, innovation and creativity.

(2) Prevents working at cross purposes. Results in better communication and coordination between and among the divisions and departments of the organization. Streamlines management of the organization.

(3) Stresses communication of and concentration on the organization's goals and objectives by all members of the organization.

(4) Replaces emphasis on procedures or activities (the how) with emphasis on results or outcomes (the what). A management approach that is accomplishment and contribution-oriented instead of task-oriented - stresses results rather than placing major importance on methods and procedures.

(5) Provides a realistic, objective and challenging system of performance appraisal - appraisal of results instead of personality.

(6) Places emphasis on opportunities and the future rather than problem solving. This can result in systematic planning as a cooperative and continuing process.

(7) Assures for the continuing growth of all memebers of the organization.

(8) Is responsive to the demands of accountability and changing conditions. Allows people to own a "piece of the action".

(9) Results in improved commitment and performance toward the accomplishment of organizational goals.

(10) Is compatible with decentralization and can result in decentralization over a sustained period of time.

I would like to conclude by pointing out that the implementation of self-directed management is not easy. Sustained leadership and commitment by top management is required. If an organization is not willing to make a three-to-five year commitment, I would not recommend proceeding. In most cases, the implementation will require a change in management style that is compatible with a basic belief in people, a belief that people are capable of excellence, initiative, and creativity. People will be responsive to this management style if the organization fosters a climate of mutual trust and support, respect for the individual and individual differences, and encourages open communication and feedback.

Self-directed management is one way of allowing people to make "Systems Go" and, at the same time, meet the ever-increasing demands for visible and effective educational results.

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SUGGESTED LIST OF READINGS IN SELF-DIRECTED MANAGEMENT

J. D. Batten	BEYOND MANAGEMENT BY OBJECTIVES American Management Association, 1966 135 West 50th Street, New York, New York 10020
J. D. Batten	DEVELOPING A TOUGH-MINDED CLIMATE FOR RESULTS American Management Association, 1965 135 West 50th Street, New York, New York 10020
Richard Beckhard	STRATEGIES OF ORGANIZATION DEVELOPMENT Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California
Warren G. Bennis	NATURE OF ORGANIZATION DEVELOPMENT Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California
Lester R. Bittel	MANAGEMENT BY EXCEPTION McGraw-Hill Book Company, Inc., 1964 330 West 42nd Street, New York, New York 10036
Robert Blake & Jane Srygley Mouton	GRID ORGANIZATION DEVELOPMENT Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California
Leland P. Bradfor, Ph.D. Jack R. Gibb, Ph.D. Kenneth D. Benne, Ph.D.	T-GROUP THEORY AND LABORATORY METHOD John Wiley & Sons, Inc., 1964 New York, New York
Peter Drucker	THE AGE OF DISCONTINUITY Harper and Row Publishing Company, 1968 49 East 33rd Street, New York, New York 10016
Peter Drucker	MANAGING FOR RESULTS Harper and Row Publishing Company, 1964 49 East 33rd Street, New York, New York 10016
Peter Drucker	THE PRACTICE OF MANAGEMENT Harper and Row Publishing Company 1954 49 East 33rd Street, New York, New York 10016
Saul W. Gellerman	MOTIVATION AND PRODUCTIVITY American Management Association, Inc., 1963 135 West 50th Street, New York, New York 10020
Charles L. Hughes	GOAL SETTING American Management Association, Inc., 1965 135 West 50th Street, New York, New York 10020

SUGGESTED LIST OF READINGS IN SELF-DIRECTED MANAGEMENT (Continued)

John W. Humble	IMPROVING BUSINESS RESULTS McGraw-Hill Publishing Company, 1968 Berkshire, England
Marion S. Kellogg	CLOSING THE PERFORMANCE GAP American Management Association, Inc., 1967 135 West 50th Street, New York, New York 10020
Ray A. Killian	MANAGING BY DESIGN American Management Association, 1967 135 West 50th Street, New York, New York 10020
Laird and Laird	THE TECHNIQUE OF GETTING THINGS DONE McGraw-Hill Publishing Company, 1947 330 West 42nd Street, New York, New York 10036
Paul R. Lawrence & Jay W. Lorsch	DEVELOPING ORGANIZATIONS Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California
Harold J. Leavitt	MANAGERIAL PSYCHOLOGY University of Chicago Press, 1964 5750 Ellis Avenue, Chicago, Illinois 60637
R. L. Martino	FINDING THE CRITICAL PATH American Management Association, Inc., 1964 135 West 50th Street, New York, New York 10020
Abraham H. Maslow	EUPSYCHIAN MANAGEMENT Richard D. Irwin, Inc. & The Dorsey Press, 1965 Homewood, Illinois
Dale D. McConkey	HOW TO MANAGE BY RESULTS American Management Association, 1965 135 West 50th Street, New York, New York 10020
Douglas McGregor	THE HUMAN SIDE OF ENTERPRISE McGraw-Hill Book Company, Inc., 1960 330 West 42nd Street, New York, New York 10036
Douglas McGregor	LEADERSHIP & MOTIVATION The Massachusetts Institute of Technology Press, 1966 Cambridge, Massachusetts
Douglas McGregor	THE PROFESSIONAL MANAGER McGraw-Hill Book Company, Inc., 1967 330 West 42nd Street, New York, New York 10036
Ernest C. Miller	OBJECTIVES AND STANDARDS American Management Association, 1966 135 West 50th Street, New York, New York 10020

SUGGESTED LIST OF READINGS IN SELF-DIRECTED MANAGEMENT (Continued)

John B. Miner	THE MANAGEMENT OF INEFFECTIVE PERFORMANCE McGraw-Hill Publishing Company, 1963 330 West 42nd Street, New York, New York 10036
National Industrial Conference Board	MANAGING BY AND WITH OBJECTIVES Study No. 212, 1968 845 Third Avenue, New York, New York 10022
George S. Odiorne	MANAGEMENT BY OBJECTIVES Pitman Publishing Company, 1965 6 East 43rd Street, New York, New York 10017
Carl R. Rogers, Ph.D	ON BECOMING A PERSON Houghton Mifflin Company, 1961 Boston, Massachusetts
Edgar H. Schein & Warren G. Bennis	PERSONAL AND ORGANIZATIONAL CHANGE THROUGH GROUP METHODS John Wiley & Sons, 1965 New York, New York
Edgar H. Schein	PROCESS CONSULTATION Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California
Raymond F. Valentine	PERFORMANCE OBJECTIVES FOR MANAGERS American Management Association, 1966 135 West 50th Street, New York, New York 10020
Richard E. Walton	THIRD PARTY CONSULTATION Addison-Wesley Publishing Company, 1969 Reading, Massachusetts & Menlo Park, California

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THE MASLOW NEED HIERARCHY

Abraham Maslow theorized that experienced needs are primary influences on an individual's behavior. When a particular need emerges, it determines the individual's behavior in terms of motivations, priorities, and action taken. Thus motivated behavior is the result of the tension -- either pleasant or unpleasant -- experienced when a need presents itself. The goal of the behavior is the reduction of this tension or discomfort, and the behavior, itself, will be appropriate for facilitating the satisfaction of the need. Only unsatisfied needs are prime sources of motivation.

Understanding behaviors and their goals involves gaining insight into presently unsatisfied needs. Maslow developed a method for gaining insight by providing categories of needs in a hierarchical structure. He placed all human needs, from primitive or immature (in terms of the behaviors they foster) to civilized or mature needs, into five need systems. The progression through the need hierarchy is seen as the climbing of a ladder where the individual must have experienced secure footing on the first rung in order to experience the need to step up to the next higher rung. The awareness of the need to climb further up the ladder is a function of having fulfilled the need of managing the preceding rung, and only satisfactory fulfillment of this need will allow the individual to deal with the new need or rung. Inability to fulfill a lower-order need or difficulty in fulfilling a lower-order need may result in an individual's locking in on immature behavior patterns or may produce a tendency to return to immature behaviors under stress. The individual may also revert to behaviors which fulfilled lower-order needs when the satisfaction of higher needs are temporarily blocked. That is not to say that any need is ever completely satisfied; rather, Maslow indicates that there must be at least partial fulfillment before an individual can become aware of the tensions manifested by a higher-order need and have the freedom to pursue its fulfillment.

The Basic level represents needs which reflect physiological and survival goals. At this level are such factors as shelter, clothing, food, sex, and other necessities. In a culture such as ours where these basic needs are almost automatically met, there is not likely to be any need tension concerning the fulfillment of Basic needs. However, individuals adapt this basic level upward to include such needs as avoidance of physical discomfort, pleasant working environment, or more money for providing creature comforts.

The second level of the hierarchy consists of Safety needs. When the individual has at least partially fulfilled the Basic needs, he will experience the tensions relating to needs of security, orderliness, protective rules, and general rush avoidance. These needs are often satisfied by an adequate salary, insurance policies, a good burglar alarm system for his business, a doorman for his apartment building, etc.

When Safety needs have been met, the individual will become less preoccupied with self and will endeavor to form interpersonal relationships. The relative success of this need for Belongingness will result in his feeling accepted and appreciated by others. Thus the third level needs concern family ties, friendship and group membership.

When an individual feels secure in his relationships with others, he will probably seek to gain special status within the group. His need tension will be associated with ambition and a desire to excel. These Ego-Status needs will motivate the individual to seek out opportunities to display his competence in an effort to gain social and professional rewards.

Because Ego-Status fulfillment is greatly dependent upon the ability of others to respond appropriately to the individual's efforts to perform in a superior way, they are the most difficult to fulfill satisfactorily. However, if the individual has gained satisfaction on level four, he may be able to move up to level five - Self-Actualization. At this level the individual is concerned with personal growth and may fulfill this need by challenging himself to become more creative, demanding greater achievement of himself, and, in general, directing himself to measure up to his own criteria of personal success. Self-Actualizing behaviors must include risk-taking, seeking autonomy, and developing freedom to act.

Sandra L. Pfeiffer

Reference: A.H. Maslow. Motivation and Personality. 2nd ed. N.Y. Harper and Row, 1970.

MANAGEMENT GUIDELINES

There is pretty general agreement regarding the basic tasks of management. The following are generally accepted as being the more important functions of a manager:

1. Seeing opportunities
2. Planning
3. Organizing
4. Controlling
5. Evaluating and improving
6. Developing subordinates

Success in management will not necessarily result from the knowledge of, and the ability to discharge these basic tasks of supervision. Many managers are able to discharge these basic tasks in a proficient manner but never become outstanding managers because of failure to master another very important requisite--the ability to get things done. This attribute (the ability to get things done) is the major difference between outstanding managers and technically qualified, but mediocre managers.

The following guidelines will not be found in textbooks or classes on school business management, but the application of some of these suggestions may have a real bearing on your success or failure as a manager, and more importantly, on your health and happiness in your job.

Learn to Manage Your Time Well (10 guidelines)

(1) Plan to get your work done during regular office hours and then force yourself to follow your plan. People who work extremely long hours generally operate at a low rate of efficiency at all times.

(2) Adopt a working schedule that suits you best. This may not necessarily be 8 - 5. Each of you will have to determine what is the best working schedule for you.

(3) Be decisive.

   a. Decide the small things promptly and get them out of the way.
   b. Then, when you are deciding other matters, select your choices firmly.
   c. Abandon all alternatives.
   d. Act upon your decision.
   e. Don't be afraid of making mistakes.

(4) Avoid procrastination.

a. Take a little time to determine just what is involved in the job you are putting off.

b. Set a definite time when the task will be done. Then go about other things if you want to, BUT

c. Stick by the time schedule you set for yourself.

(5) Don't make excuses.

a. Don't spend time excusing yourself for inaction. Replace inaction with action.

b. Don't hold post-mortems. Let yesterday's mistakes remain buried with yesterday.

(6) Force yourself to work. In other words, be a professional. Learn to take a detached attitude towards your mental states. The fact that you had an argument with your wife or something like that should not have a bit of bearing on your work; be a professional. You have a job to get done. Get it done. Forget about your headaches and all of your other problems, and concentrate on your job.

(7) Avoid the time-consuming habit of documenting everything. This may be a problem for most of us. In some cases, a telephone call may not only be quicker but actually better than some slower form of communication--especially when you want an immediate answer.

(8) Learn to make decisions more quickly. Procrastination only means that investigating a situation or listening to a problem must be repeated again when the decision is given. Decide when the problem is posed, and the job is done.

(9) Try to say "no" to some of the requests made of you. It's flattering to be asked to speak or to serve on a committee when you can share your talents. However, these demands upon your time can impede your effectiveness on the job.

(10) Evaluate your working schedule periodically. This is very important. I find that when I get to the point where I am hopelessly bogged down and I feel that I have just got to have two or three more people to help me, if I take time and really examine my working schedule, I will generally find that I can get the job done by organizing it properly. Personally, I find that I have to do this two or three times a year. I believe that most of us will find the same thing.

Organize Yourself for Maximum Production (11 guidelines)

People don't think of managers in terms of production, but this is a production job. You have just so many productive hours a day to get a lot of work accomplished. You have to make many decisions and get a lot of things accomplished. You will accomplish more if you are properly organized.

(1) Spend a few minutes at the end of each day planning your work schedule for the following day. I think this is extremely important. Establish realistic schedules and then follow them.

(2) Organize the physical arrangement of your office for maximum production. Think about this a little bit. If you have to get up and walk across the room every time to put something in the file basket, just imagine how much time you lose over a period of a day. You should spend a little time actually analyzing your layout to get it organized in the very best productive manner, in the same way that a layout man would do in a factory as far as an assembly line is concerned. There should be no unnessary movements on your part in order to get your work accomplished. An effective manager generally operates from a well organized and uncluttered desk.

(3) Keep the paper work moving. It's better to consign unimportant things to the waste basket than to be constantly frustrated with a pile of unfinished work.

(4) Don't become desk bound. Set aside some time periodically to get out into your department to see how well your services are being performed. It is very important to your success as a manager to get out into your department to see opportunities and to evaluate and improve services.

(5) Do the important things first. Give key matters your attention when you are fresh and fit--save the routine and minor matters for the let-down periods. I think this is rather important. I find for myself that the hours between 7:30 - 9:30 are when I get all of the really important jobs done. The minor routine things can be taken care of between calls and conferences in the afternoon when you are mentally run down.

(6) Arrange your work to dispose of those things that can be handled promptly. The few projects that remain are not hard to cope with, if the pile of work no longer looks like a hopeless task to tackle.

(7) Don't waste too much time with a problem that, for the moment, has you licked. Put it aside and come back to it when your mood and mind toward it have improved. Be careful, of course, not to postpone the task indefinitely. Consider the use of a tickler file.

(8) Take time to evaluate your performance occasionally. Get out of the woods to look at the trees. I think that most of us find that we get so close to the problems, to the minor problems of our jobs, that we don't really get the over-all perspective. We need occasionally to do this.

(9) Take time to communicate with others who may be interested or involved with you in a project. A few minutes spent at the start to explain something can save endless hours later by preventing misunderstandings or fuzzy instructions.

(10) Try to anticipate serious problems in advance and prepare for them. A problem never becomes serious if you are properly prepared to cope with it.

(11) Concentrate on one thing at a time. I think this is extremely important. Many of us get so concerned with the pile of work waiting for us that we can't concentrate on one thing. If you will concentrate on one thing at a time and complete each job before worrying about the next one, you will be surprised how fast the backlog disappears.

Joseph P. Kennedy was asked how in the world he could ever write a book. His answer was that he had never written a book, but that he wrote only one page at a time. We should apply that simple analogy to our work--try not to let the tremendous task worry you--it is made of small segments--each segment is easy to accomplish and if you attack each part the major task is accomplished before you realize it. It's true! That's the way we live--we live a day at a time; we eat a meal at a time; we sleep eight hours at a time;--to try to do all our sleeping in the first third of our expected life would be senseless and impossible. So when you are faced with some tremendous task or problem, whittle it down bit by bit, just as the termite levels the oak with his persistent sawdusting. Just keep your eye on the target, but make sure your target is within range! Remember what Confucius said: "A trip of a thousand miles starts with one step."

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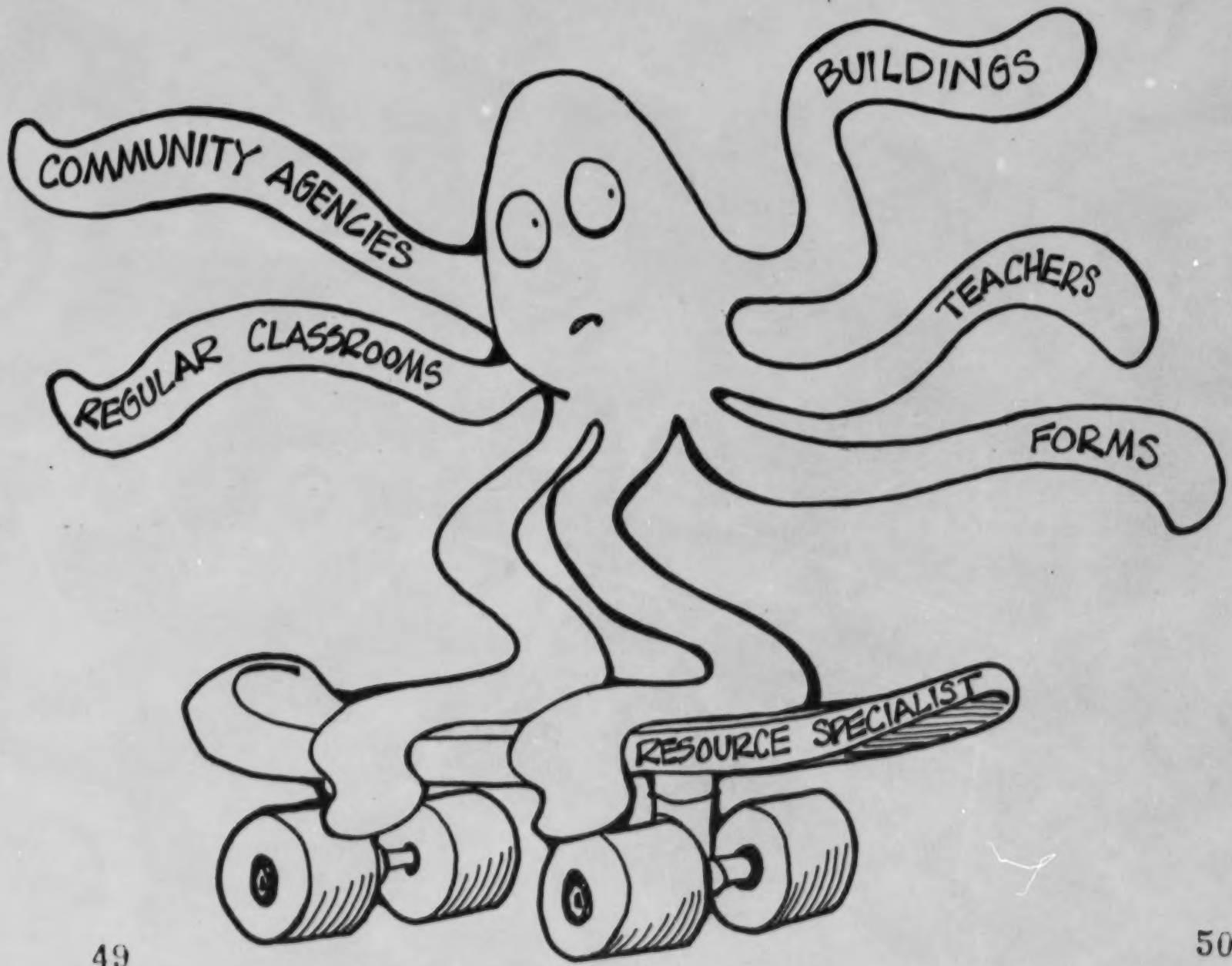
APPENDIX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TEACHERS
REGULAR CLASSROOMS
FORMS
RESOURCE SPECIALIST

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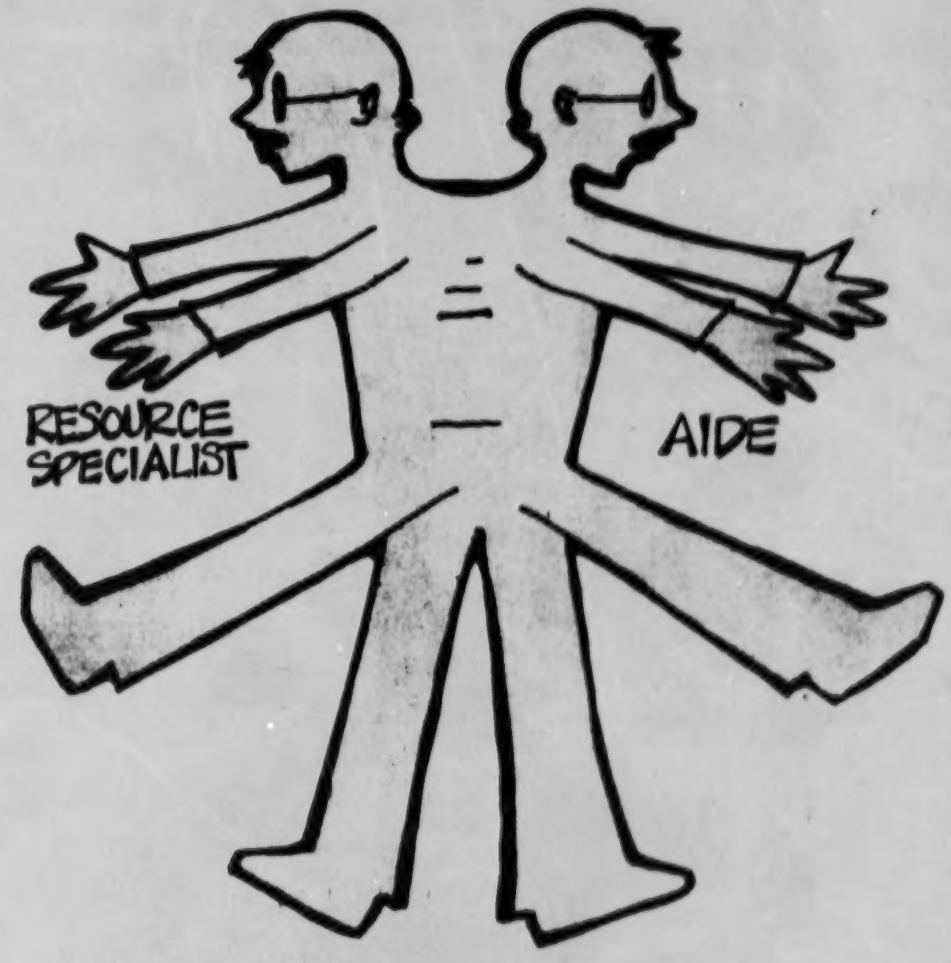

RESOURCE
SPECIALIST
AIDE

RESOURCE SPECIALISTS ROLE

- INSTRUCTION AND SERVICES FOR SPECIAL EDUCATION STUDENTS

- INFORMATION AND ASSISTANCE TO SPECIAL EDUCATION STUDENTS AND PARENTS

- CONSULTATION ABOUT SPECIAL EDUCATION STUDENTS TO PARENTS AND REGULAR EDUCATION STAFF

- COORDINATION OF RESOURCE SPECIALIST PROGRAM WITH REGULAR SCHOOL PROGRAM FOR IDENTIFIED STUDENTS

- MONITORING PUPIL PROGRESS

- SECONDARY LEVEL - EMPHASIS ON ACADEMIC ACHIEVEMENT, CAREER AND VOCATIONAL PREPARATION FOR ADULT LIFE

- AVERAGE CASE LOAD NO MORE THAN 24
  - NO RESOURCE SPECIALIST SHALL HAVE MORE THAN 28
  - 1 OR MORE INSTRUCTIONAL AIDE
  - MAY NOT ENROLL STUDENTS FOR MAJORITY OF SCHOOL DAY

THE RESOURCE SPECIALIST PROGRAM SHALL

(1) PROVIDE INSTRUCTION AND SERVICES FOR PUPILS WHOSE NEEDS HAVE BEEN IDENTIFIED IN AN INDIVIDUALIZED EDUCATION PROGRAM DEVELOPED BY THE IEP TEAM AND WHO ARE ASSIGNED TO REGULAR CLASSROOM TEACHERS FOR A MAJORITY OF A SCHOOL DAY.

(2) PROVIDE INFORMATION AND ASSISTANCE TO INDIVIDUALS WITH EXCEPTIONAL NEEDS AND THEIR PARENTS.

(3) PROVIDE CONSULTATION, RESOURCE INFORMATION, AND MATERIAL REGARDING INDIVIDUALS WITH EXCEPTIONAL NEEDS TO THEIR PARENTS AND TO REGULAR STAFF MEMBERS.

(4) COORDINATE SPECIAL EDUCATION SERVICES WITH THE REGULAR SCHOOL PROGRAMS FOR EACH INDIVIDUAL WITH EXCEPTIONAL NEEDS ENROLLED IN THE RESOURCE SPECIALIST PROGRAM.

(5) MONITOR PUPIL PROGRESS ON A REGULAR BASIS, PARTICIPATE IN THE REVIEW AND REVISION OF IEP, AS APPROPRIATE, AND REFER PUPILS WHO DO NOT DEMONSTRATE APPROPRIATE PROGRESS TO THE IEP TEAM.

(6) EMPHASIZE, AT THE SECONDARY LEVEL, ACADEMIC ACHIEVEMENT, CAREER AND VOCATIONAL DEVELOPMENT, AND PREPARATION FOR ADULT LIFE.

THE RESOURCE SPECIALIST PROGRAM SHALL BE UNDER THE DIRECTION OF A RESOURCE SPECIALIST WHO IS A CREDENTIALED SPECIAL EDUCATION TEACHER, WHO HAS HAD THREE OR MORE YEARS OF TEACHING EXPERIENCE, AND WHO HAS DEMONSTRATED THE COMPETENCIES FOR A RESOURCE SPECIALIST.

THE AVERAGE CASELOAD FOR RESOURCE SPECIALISTS SHALL BE NO MORE THAN 24 PUPILS, AND NO RESOURCE SPECIALIST SHALL HAVE A CASELOAD WHICH EXCEEDS 28 PUPILS.

EACH RESOURCE SPECIALIST SHALL BE PROVIDED WITH ONE OR MORE INSTRUCTIONAL AIDES.

RESOURCE SPECIALISTS SHALL NOT SIMULTANEOUSLY BE ASSIGNED TO SERVE AS RESOURCE SPECIALISTS AND TO TEACH REGULAR CLASSES.

RESOURCE SPECIALISTS SHALL NOT ENROLL A PUPIL FOR A MAJORITY OF A SCHOOL DAY WITHOUT PRIOR APPROVAL BY THE SUPERINTENDENT.

80070.8 (A) THE CONSULTING FUNCTION:

(1) PROVIDE CONSULTANT SERVICES TO REGULAR CLASSROOM TEACHERS IN THE IDENTIFICATION AND ASSESSMENT OF LEARNING AND BEHAVIORAL PATTERNS IN PUPILS.

(2) CONSULTATION AND ASSISTANCE IN THE UTILIZATION OF EVALUATION DATA FOR THE MODIFICATION OF INSTRUCTION AND CURRICULUM.

(3) PROVIDE CONSULTATION SERVICES IN THE APPLICATION OF CLASSROOM MANAGEMENT TECHNIQUES.

(4) PROVIDE CONSULTANT SERVICES AS TO RESOURCES (APPROPRIATE TO INDIVIDUALS WITH EXCEPTIONAL NEEDS) TO REGULAR STAFF MEMBERS, PARENTS AND GUARDIANS.

(5) CONSULT IN THE DEVELOPMENT OF PRE-VOCATIONAL AND/OR VOCATIONAL PLANS FOR INDIVIDUALS WITH EXCEPTIONAL NEEDS.

(6) CONSULT WITH REGULAR CLASSROOM TEACHERS AND STUDENTS AS TO THEIR ACCEPTANCE OF STUDENTS WITH EXCEPTIONAL NEEDS.

80070.8 (B) THE COORDINATION FUNCTION:

(1) COORDINATE REFERRAL AND ASSESSMENT PROCEDURES.

(2) ASSIST IN THE COORDINATION FOR THE INDIVIDUALIZED EDUCATION PROGRAM TEAM MEETING.

(3) COORDINATE INSTRUCTIONAL PLANNING; I.E., THE DEVELOPMENT AND IMPLEMENTATION OF INDIVIDUALIZED EDUCATIONAL PROGRAMS FOR INDIVIDUALS WITH EXCEPTIONAL NEEDS.

(4) COORDINATE THE IMPLEMENTATION OF SPECIAL EDUCATION SERVICES PROVIDED INDIVIDUALS WITH EXCEPTIONAL NEEDS.

(5) ASSIST IN THE COORDINATION OF DESIGNATED INSTRUCTION AND SERVICES.

(6) COORDINATE THE COLLECTION OF RELEVANT INFORMATION FOR THOSE STUDENTS REFERRED TO THE INDIVIDUALIZED EDUCATION PROGRAM TEAM.

(7) COORDINATE THE ORGANIZATION AND DISTRIBUTION OF MEDIA AND MATERIALS FOR BOTH RESOURCE AND REGULAR CLASSROOMS.

(8) COORDINATE INDIVIDUALIZED INSTRUCTION AND ACTIVITIES OF THE RESOURCE SPECIALIST PROGRAM WITH REGULAR CLASSROOM CURRICULUM.

(9) COORDINATE INSERVICE WORKSHOPS AND WORKSHOPS FOR STAFF AND/OR PARENTS.

(10) COORDINATE FOLLOW-UP ACTIVITIES TO INSURE SERVICE DELIVERY TO ALL INDIVIDUALS WITH EXCEPTIONAL NEEDS.

80070.8 (c) FUNCTIONS RELATED TO THE IMPLEMENTATION OF LAWS, REGULATIONS AND OTHER COMPLIANCE REQUIREMENTS:

(1) SCHEDULE AND MONITOR REFERRAL PROCEDURES IN ACCORDANCE WITH LEGAL REQUIREMENTS.

(2) MONITOR THE DEVELOPMENT OF INDIVIDUALIZED EDUCATIONAL PROGRAMS, AND CONDUCT REVIEW MEETINGS IN ACCORDANCE WITH LEGAL REQUIREMENTS.

(3) PROCESS ALL INFORMATION LEADING TO APPROVAL OF SERVICES BY CHILD'S PARENT OR GUARDIAN.

(4) PROVIDE LEADERSHIP FOR ASSURING FULL COMPLIANCE WITH LEGAL REQUIREMENTS.

80070.8 (D) STAFF DEVELOPMENT AND INSERVICE EDUCATION FUNCTION:

(1) THE UTILIZATION OF SYSTEMATIC OBSERVATIONS FOR REFERRAL TO THE INDIVIDUALIZED EDUCATION PROGRAM.

(2) THE UNDERSTANDING AND INTERPRETATION OF APPROPRIATE ASSESSMENT TOOLS.

(3) THE SELECTION AND MODIFICATION OF APPROPRIATE INSTRUCTIONAL METHODS AND MATERIALS.

(4) THE APPLICATION OF CLASSROOM ENVIRONMENT AND BEHAVIOR MANAGEMENT TECHNIQUES.

(5) THE ENHANCEMENT OF SOCIAL AND EMOTIONAL DEVELOPMENT OF EXCEPTIONAL INDIVIDUALS WITHIN THE EDUCATIONAL ENVIRONMENT OF THE REGULAR CLASSROOM.

80070.8 (e) Skills Related to the Parent Education Function:

(1) Provide parents with basic knowledge of assessment procedures and instrumentations, and how to utilize the information.

(2) Provide parents with basic understanding of remedial methods and techniques as they relate to their own child's program.

(3) Provide parents with basic home enrichment and home management techniques designed to meet the needs of their child.

(4) Counsel parents in areas related to their child's abilities, including strengths and weaknesses; as well as to the child's needs and goals, including career and vocational planning alternatives.

(5) Provide parents with information as to effective utilization of community resources.

(6) Assist in planning of parent education workshops.

Note: Authority Cited: Section 44225, Education Code.
Reference: Section 56362 and 56362.5, Education Code.

OH-10

ON BEING AND BECOMING --

AN ASSET

1. BONE UP ON INFORMATION RELEVANT TO THE DEVELOPMENT STAGES OF STUDENTS.

   EXPLORE THE POSSIBILITY OF HAVING SOMEONE ELSE OR TAKING YOURSELF ON FIELD TRIPS THROUGH DIFFERENT CLASSROOMS AND RESOURCE ROOMS TO OBSERVE STUDENTS OF DIFFERING AGES AND DEVELOPMENTAL LEVELS AT WORK. ARRANGE TO MEET WITH YOUR SUPERVISOR FOLLOWING THE VISITATION TO DISCUSS YOUR OBSERVATIONS.

2. LOOK FOR EVIDENCE:

   (A) INDIVIDUALIZED INSTRUCTION

   (B) DIAGNOSIS OF STUDENT NEEDS (PRACTICAL INSTRUMENTS)

   (C) CHARTING OR RECORDING OF PUPIL PROGRESS

   (D) VARIETY OF MATERIALS, MEDIA FOR INSTRUCTION

3. COLLECT HELPFUL IDEAS FOR:

   (A) TASK ANALYSIS OF CONTENT FOR PRESENTATION

   (B) GAINING PUPIL ATTENTION

   (C) AVOIDING DISTRACTIONS (PHYSICAL ARRANGEMENT OF SPACE)

   (D) MOTIVATION OF PUPILS AND APPROPRIATE REWARD SYSTEMS

   (E) MANAGING PUPIL BEHAVIOR

   (F) FAMILIARIZE YOURSELF WITH INFORMATION RELEVANT TO LEARNING STYLES

ON BEING AND BECOMING --

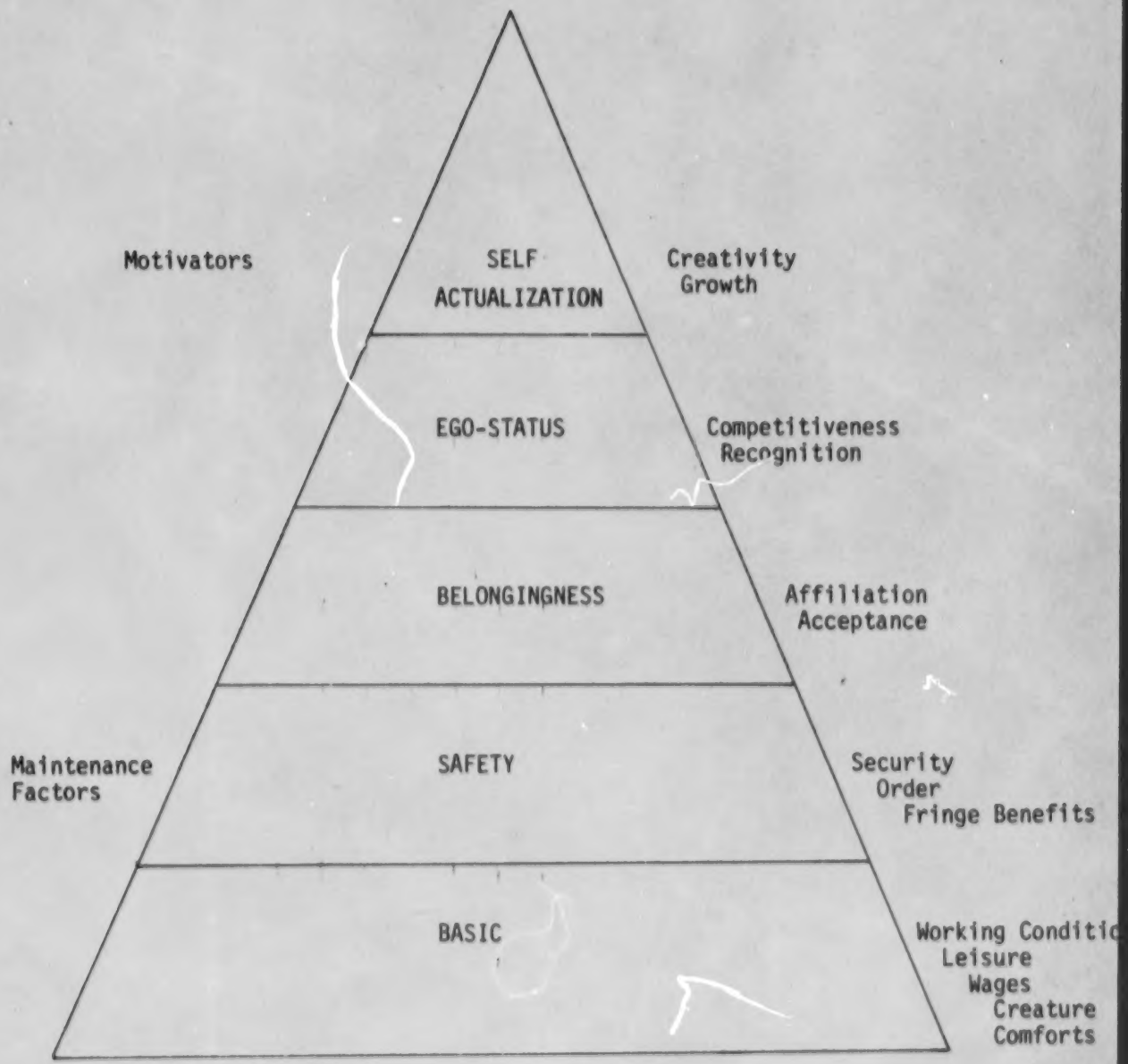
AN ASSET (CONTINUED)

4. REMEMBER:

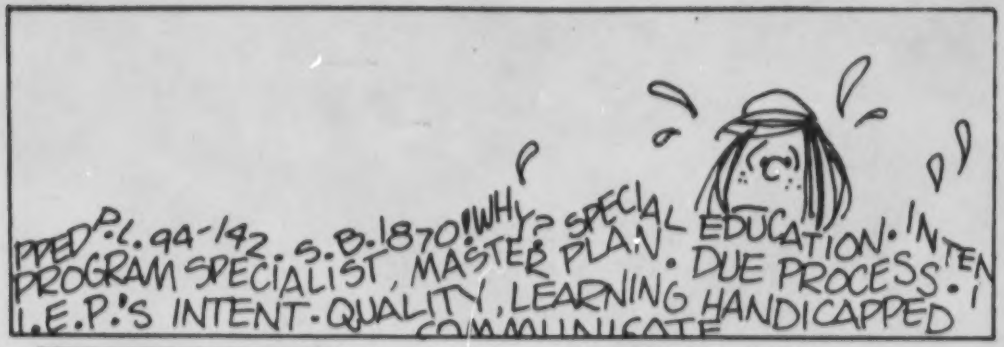
   (A) YOU SHOULD BE GIVEN AN ORGANIZED DAILY SCHEDULE, ADJUSTED FOR THE RESPONSIBILITY YOU WILL ASSUME,

   (B) YOU SHOULD ARRANGE A REGULARLY SCHEDULED PLANNING/EVALUATION SESSION EITHER DAILY OR WEEKLY. YOUR SCHEDULE COULD BE USED AS A "TALKING PAPER" ON WHICH TO MAKE SUGGESTIONS AND EVALUATIONS AND KEEP NOTES. THIS IS IMPORTANT FOR YOU TO SEE YOUR OWN PROGRESS.

   (C) AS AN AIDE YOU DO NOT HAVE THE RESPONSIBILITY FOR TEACHING THE STUDENTS. YOU MAY REINFORCE A CONCEPT AFTER IT HAS BEEN INTRODUCED BY THE TEACHER OR RESOURCE SPECIALIST.


Motivators
SELF ACTUALIZATION
Creativity Growth
EGO-STATUS
Competitiveness Recognition
BELONGINGNESS
Affiliation Acceptance
Maintenance Factors
SAFETY
Security Order Fringe Benefits
BASIC
Working Conditio
Leisure
Wages
Creature Comforts

OH-12


PPED P.L. 94-142. S.B. 1870! WHY? SPECIAL EDUCATION. INTEN
PROGRAM SPECIALIST, MASTER PLAN. DUE PROCESS. I
I.E.P.'S INTENT-QUALITY, LEARNING HANDICAPPED
COMMUNICATE

YOU LOOK LIKE YOU'RE SINKING, SIR..
I AM, MARCIE.

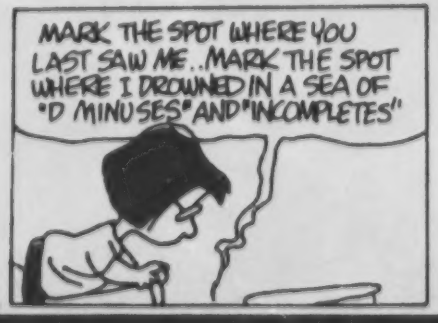
I'M DROWNING IN A SEA OF UNANSWERED QUESTIONS...

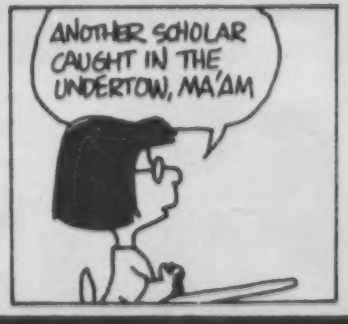
NOW, I SUDDENLY SURFACE! I SPLASH FRANTICALLY... "HELP!" I CRY... "SAVE ME!"

NOW, I SINK FOR THE SECOND TIME... QUESTIONS POUR OVER MY HEAD.. "WHO WAS VOLTAIRE?" "WHO WAS CATO THE ELDER?"

NOW, I COME UP FOR THE LAST TIME... SPUTTERING HALF-ANSWERS.. SPITTING OUT VERBS, INFINITIVES, COMMAS...

I SINK BENEATH THE SURFACE... I'M GONE, MARCIE... I'M GONE...


MARK THE SPOT WHERE YOU LAST SAW ME.. MARK THE SPOT WHERE I DROWNED IN A SEA OF "D MINUSES" AND "INCOMPLETES"


ANOTHER SCHOLAR CAUGHT IN THE UNDERTOW, MA'AM

PERHAPS A RESOURCE SPECIALIST COULD HAVE SAVED HER.
SCHULZ

TRAINING ACTIVITIES

Activities excerpted from

"Handbooks of Structured Experiences
for Human Relations Training"

Vol I - IV

by
Pfeiffer and Jones

University Associates
8517 Production Ave.
San Diego, CA 92121

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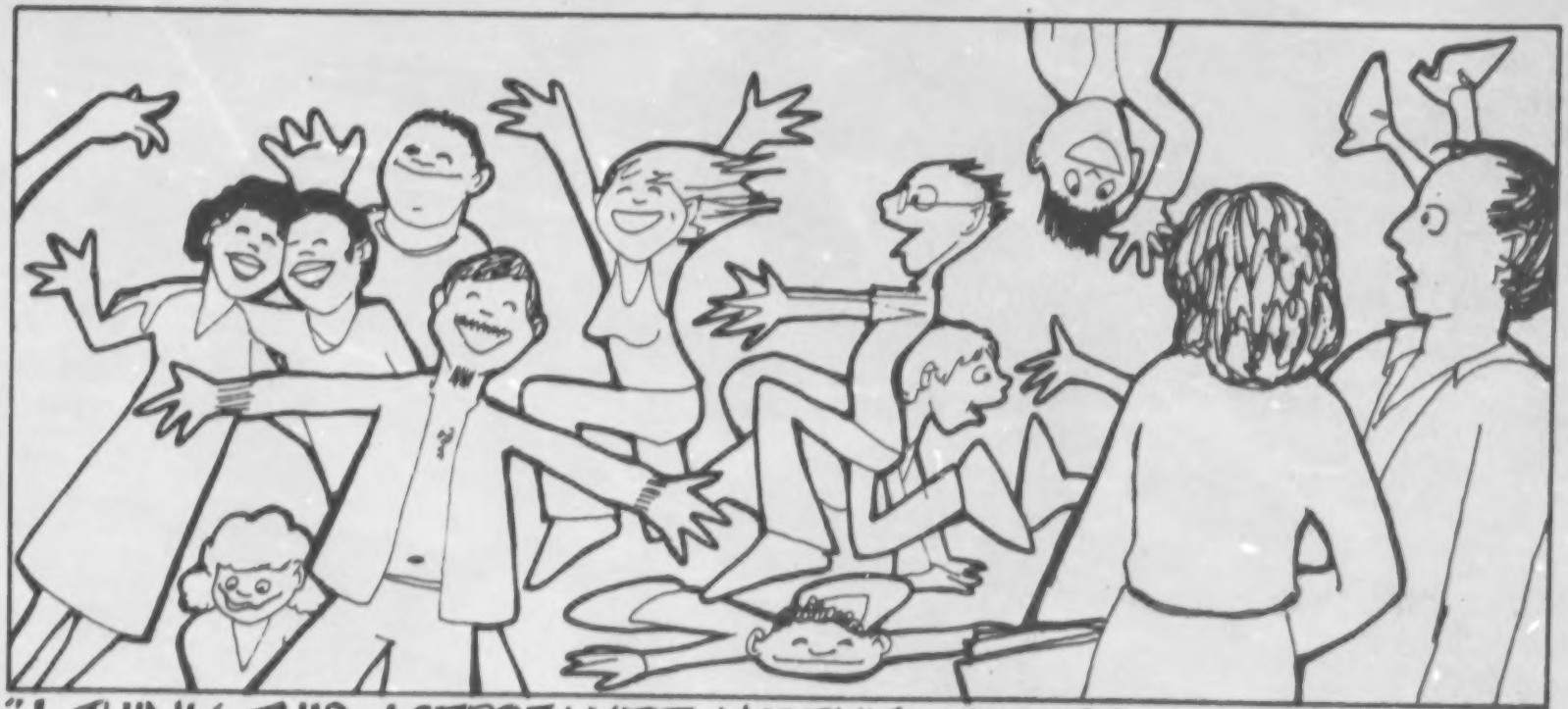
ACTIVITIES



"I THINK THIS ICEBREAKER WORKED A LITTLE TOO WELL!"

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GET ACQUAINTED

PEOPLE HUNT

Get a different signature for each item. Happy hunting!

1. A PERSON WHO TEACHES THE SAME GRADE LEVEL(S) AS YOU TEACH.

   _____

2. A PERSON WHO HAS TAUGHT THE SAME NUMBER OF YEARS.

   _____

3. A PERSON WHO IS A PARENT.

   _____

4. A PERSON WHO GRADUATED FROM THE SAME UNIVERSITY.

   _____

5. A PERSON WHO LIKES TO PEEL ORANGES.

   _____

6. A PERSON WHO WAS BORN IN THE SAME ASTROLOGICAL SIGN AS YOU.

   _____

7. A PERSON WHO TRAVELED OUT OF THE COUNTRY LAST SUMMER.

   _____

8. A PERSON WHO CAN SPEAK TWO LANGUAGES.

   _____

9. A PERSON WHO WOKE UP FEELING GOOD THIS MORNING.

   _____

10. A PERSON WHO WAS BORN IN THE SAME STATE.

    _____

11. A PERSON WHO CAN TOUCH THEIR NOSE WITH THEIR TONGUE.

    _____

12. A PERSON WHO HAS THE SAME RECREATIONAL INTEREST/PURSUIT AS YOU.

    _____

GETTING ACQUAINTED: A POTPOURRI

Below are listed several structered experiences that can be used as ice-breakers in human relations training events. These getting-acquainted ideas can be employed in laboratories, conferences, class meetings, and other group meetings.

1. Superlatives. Participants are asked to study the composition of the group quietly and to decide on a superlative adjective that describes themselves in reference to the others. (Example: youngest, tallest, most up-tight.) Then they tell their adjectives, explain, and test the accuracy of their self-perceptions.

2. Hometown. Secure a large blank map from a school supplies dealer. Post the map and have each participants write his first name and home-town in the proper place on the map. (As he tells about his hometown, he is disclosing important things about himself.)

3. Demographics. On a chalkboard, the group lists all of the background data that they would be interested in knowing about each other, such as age, marital status, educational history, etc. Participants in turn tell who they are in reference to these demographic questions.

4. Progressive Inference. Post sheets of newsprint on the walls, one for each participant. Group members write their first names on the sheets and then begin four rounds of self-disclosure. First, each writes his favorite English letter (A,B,C,etc.) on his sheet, returns to his seat, explains his choice, and is questiond by his fellow participants. In rounds two-four, the content is his favorite word, then his favorite phrase, and finally his favorite sentence. (Chip R. Bell, North Carolina National Bank, Charlotte.)

5. Design. Subgroups are formed to brainstorm getting acquainted ideas. They select representatives who meet in the center of the room to plan an ice-breaking activity. (This meeting may be interrupted for process observations by the remainder of the group.) After a break, the representatives conduct their own design.

6. Draw a Classroom. Participants are given paper and pencils and are instructed to draw a classroom. They have five to ten minutes to work privately in this phase. After everyone finished they hold their drawings in front of them and circulate around the room without speaking (ten minutes). Then they are asked to return to two or three interesting people to talk with them. Subgroups are formed to discuss the content of the drawings and to report to the total group. (Variations: draw an office or a shop.) (Robert T. Williams, Colorado State University, Fort Collins.)

"WHO AM I?" VARIATIONS: A GETTING-ACQUAINTED ACTIVITY

Goal

To allow participants to become acquainted quickly in a relatively non-threatening way. (These variations may be especially appropriate for participants who have difficulty writing about themselves, as in "Who Am I?" Vol. I: Structured Experience 5)

Group Size

Unlimited

Time Required

Approximately forty-five minutes

Materials

I. Sheets of paper, 12" x 20", one to be fastened around each participant's neck "bib-style," with a string.

II. Ball of string and scissors.

III. Pencils or felt-tipped markers.

Physical Setting

Large room in which participants may move freely.

Process

I. Participants receive the materials and are allowed ten minutes for any of the following activities to introduce themselves to fellow participants. The facilitator may choose one variation for all participants or allow participants to choose any variation they wish.

1. Participants may draw a picture or pictures of themselves: caricature, a cartoon strip, etc.

2. Participants may draw a pie with different-sized wedges to illustrate percentages of themselves devoted to certain life focuses--for example, a love-distribution pie or an energy pie.

3. Participants may draw a "life-line" - a graph of their lives to the present, showing high--or a projected total life line which indicates where they are now.

4. Participants may write a series of words, such as adjectives. Words might be selected through free association.

5. Specialty groups, such as musicians, math engineers, or chemists, may identify themselves with their own symbols.

6. Paritcipants may draw pictures of animals, objects, or music with which they identify.

7. Participants may write words to indicate their own values.

II. Each participant ties his completed sheet around his neck.

III. Participants circulate in cocktail-party fashion, but without speaking. (Background music is optional.)

IV. The facilitator asks participants to move on to a new person every minute for a total of ten to fifteen "meetings".

V. After this nonverbal phase, the participants are told to return to two or three people they thought would be interesting, based on their previous encounters. They may now speak to one another. They may be encouraged to ask questions they ordinarily would not ask.

Variations

I. Instead of the question "Who Am I?", participants can complete the open-ended statement "I am becoming the kind of person who..." or the sentence "I am pretending that...." (It is important that at least ten different responses be called for, so that participants move beyond superficial self-disclosure.)

II. Participants may be asked to avoid giving demographic data in their answers. The facilitator may illustrate by pointing out the difference between "What Am I?" (husband, father, counselor, etc.) and "Who Am I?" (tense, a taker of risks, managing myself toward openness, etc.)

III. Self-descriptive adjectives can be called for instead of answers to the question. A second column of adjectives could be in response to the question "How would I like to be?"

IV. Pariticpants may be permitted to speak in Process step III.

V. After the processing, participants can post their sheets on the wall, so that all the getting-acquainted data are available for study at all times. Persons may edit their sheets at any time during the training event.

VI. As a closure activity, participants may be instructed to write what they learned during the training. The content may be varied. For example, in a personal growth laboratory the topic could be "What I learned about me"; in a leadership/management development laboratory, the topic could simply be "What I learned" or "What I am going to do differently."

GROUP CONVERSATION: DISCUSSION-STARTERS

Goal

To develop a compatible climate and readiness for interaction in a group through sharing personal experience.

Group Size

Up to thirty members. (Small groups tend to be more intense, but the activity can be carried out effectively in moderately large groups.)

Time Required

Group Conversation can be a fifteen-minute preface to other group activities, or it may be planned for an entire evening or for several meetings, depending on the goals of the group.

Materials

Copies of the Group Conversation Starters Sheet for all participants.

Physical Setting

Group members sit in a circle.

Process

The facilitator must be able to provide a comfortable balance between autocratic and democratic leadership if the group is to function well. This means that he must be prepared to redirect the group toward personal feelings and experiences if the conversation shifts to intellectualizing; it also means that he must intervene tactfully if one member is taking up more than his share of time.

I. The facilitator explains that the participants will share experiences rather than opinions. Group Conversation is person-and-feeling centered and is not be confused with group discussion, which is problem-and-intellect centered. He may also point out that when a group exchanges personally meaningful experiences, a warmth and closeness usually develops.

II. The facilitator distributes the Group Conversation Starters Sheet.

III. Participants volunteer subjects about which they are willing to converse.

IV. The facilitator encourages group members to begin the conversation with descriptions of childhood experiences which illustrate their feelings and attitudes toward the subject. The facilitator may need to ask questions to help group members describe their experiences. As the conversation progresses, the facilitator allows it to move into post-childhood experiences and the present. The participants should see the progression of certain ideas or themes.

V. The facilitator leads a brief discussion of the experience.

Structured Experience

Variations

I. Instead of distributing the Group Conversation Starters Sheet, the facilitator can have the only copy and call out the subjects to be used one at a time.

II. To make the Starters Sheet more appropriate to a particular group, it can be edited, expanded, or generated within a group session.

III. One Starters Sheet can be passed around the group, and each member can select the next subject to be discussed.

IV. The Starters Sheet can be posted on newsprint.

V. Participants can be paired to interview each other on significant subjects from the Starters Sheet. After about twenty minutes, the group reconvenes, and each person reports what his partner said.

Reproduced from

A Handbook of Structured Experiences for
Human Relations Training, Volume II
J. William Pfeiffer and John E. Jones, Editors
La Jolla: UNIVERSITY ASSOCIATES Publishers, Inc., 1974

GROUP CONVERSATION STARTERS SHEET

1. Other people usually....
2. The best measure of personal success is....
3. Anybody will work hard if....
4. People think of me as....
5. When I let go....
6. Marriage can be....
7. Nothing is so frustrating as....
8. People who run things should be....
9. I miss....
10. The thing I like about myself is....
11. There are times when I....
12. I would like to be....
13. When I have something to say....
14. As a child I....
15. The teacher I liked best was a person who....
16. It is fun to....
17. My body is....
18. When it comes to women....
19. Loving someone....
20. Ten years from now, I....

Reproduced from

A Handbook of Structured Experiences for
Human Relations Training, Volume II
J. William Pfeiffer and John E. Jones, Editors
La Jolla: UNIVERSITY ASSOCIATES Publishers, Inc., 1974

COMMUNICATIONS STRESS MANAGEMENT

FRUSTRATIONS AND TENSIONS

Goals

To help participants to become aware of their responses to tense, frustrating situations.

To study alternative responses to such situations.

Group Size

Six to twelve participants. A number of groups may be directed simultaneously in the same room.

Time Required

Approximately forty-five minutes.

Materials Utilized

I. Frustrations and Tensions Worksheet I.

II. Frustrations and Tensions Worksheet II.

III. Pencils.

Physical Setting

Groups should be seated around tables, or lapboards should be provided.

Process

I. The facilitator explains the goals of the experience.

II. Worksheet I is handed to each of the participants, and they are instructed to fill in the missing dialogue in the two cartoons and to briefly note the assumptions that they are making about each situation.

III. Each group then discusses the responses made by its members to each of the situations, exploring the probable effects of each response.

IV. Worksheet II is distributed. Again each participant works independently on the two situations depicted in the cartoons.

V. Groups discuss members' responses to the second set of situations and try to derive generalizations about effective responses in tense, frustrating interpersonal situations.

VI. The facilitator opens the discussion to all participants, drawing out the generalizations from each of the groups.

An alternative would be to have group members create their own cartoons on posters. These may be instances in which they have been actually frustrated and/or tense. Group members may suggest responses, and the group member who was actually involved may compare the response which he actually made to what is suggested.

Another variation might be to use the cartoons as a vehicle for feedback to individual group members. Members may be asked to predict what one particular member might say in each of the four situations.

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OH-2

Assumptions that you made about the situation:

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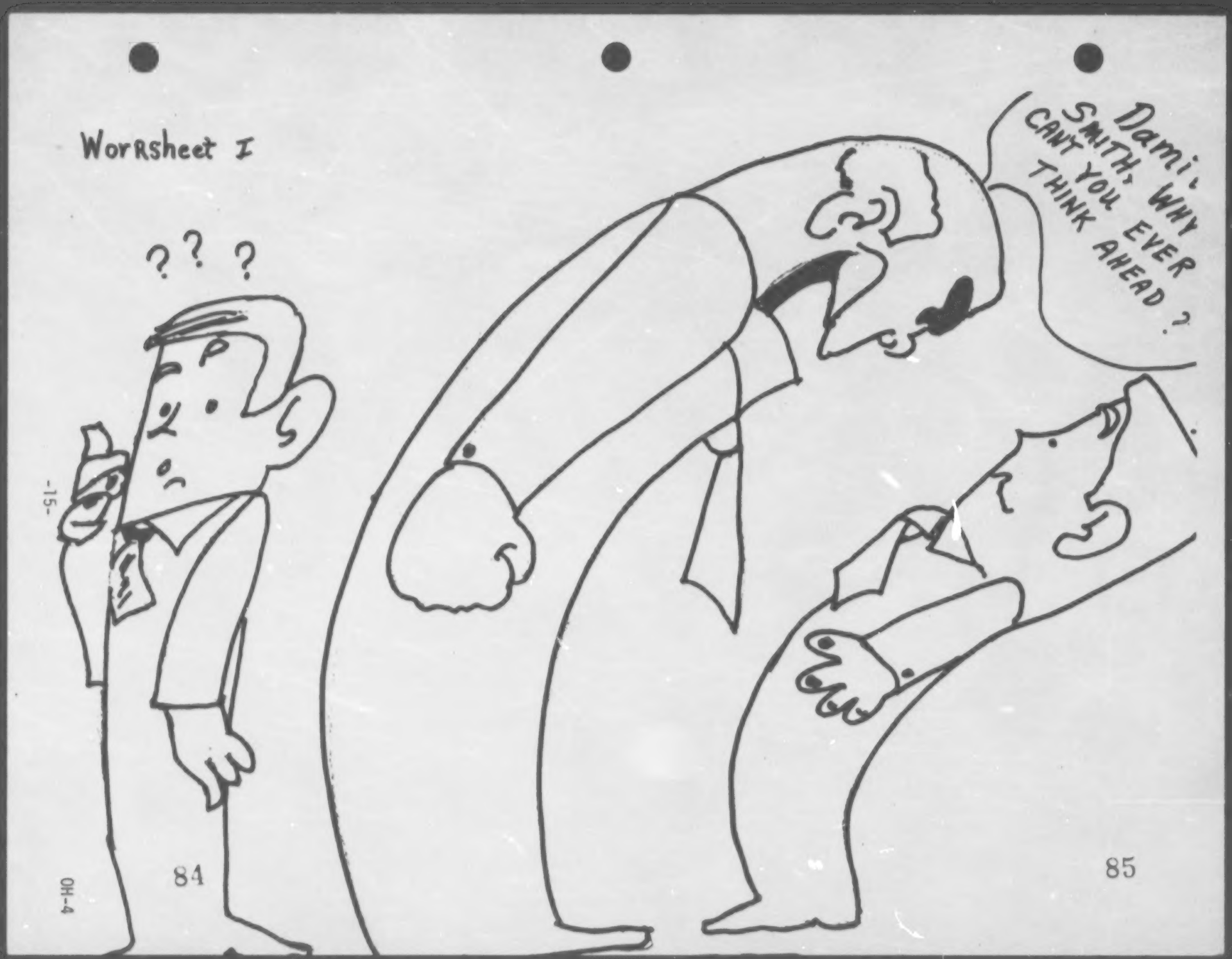
OH-3


Worksheet I
? ? ?
Damn, SMITH, WHY CAN'T YOU EVER THINK AHEAD ?
84
85

Worksheet II

GROUP DYNAMICS

THE IN-GROUP: DYNAMICS OF EXCLUSION

Goals

To allow participants to experience consciously excluding and being excluded.

To confront feelings which exclusion generates.

To examine processes by which social identity is conferred by the excluding group and accepted by the excluded member.

Group Size

Unlimited number of small groups of five or six participants each.

Time Required

Approximately one-and-a-half hours.

Materials Utilized

Refreshments, such as cold drinks and snacks.

Physical Setting

Room large enough so that groups can work without disturbing each other.

Process

I. The facilitator forms small groups of five or six participants each and asks the groups to be seated on the floor, leaving some distance between groups.

II. The facilitator directs each group to exclude some member based upon criteria consensually devised by the group. He tells the groups that they have twenty minutes to perform this task. When each excluded member has been selected, he is sent to a predetermined place in the room.

III. After each group has excluded a member and the excluded participants are seated in the special place provided for them, the facilitator tells everyone except those who are excluded to take a fifteen-minute refreshment break. He instructs those taking a break not to communicate with or include, in any way, the members of the excluded group during this time.

IV. Following the refreshment break, the facilitator asks the groups to reassemble and quickly choose a spokesman. Excluded members may not rejoin their groups at this time. He then asks the excluded group to locate in the center of the room and the nonexcluded groups to form around this group in clusters so that each group remains intact.

V. The facilitator asks each member of the excluded group to tell why he was excluded from the group, whether he feels that the exclusion was justified, how he feels about the group that excluded him, and how he feels about the other excluded members.

VI. After each excluded participant has spoken, the facilitator asks the spokesman from each excluding group to tell what their criteria were for excluding and why they felt that the excluded member met the criteria.

VII. When each spokesman has finished, the original groups are reassembled, including excluded members. Their task is to react to the content of the previous phases.

VIII. The facilitator then asks the participants to form one large group. He presents a lecturette on the dynamics of exclusion, emphasizing aspects of social identity, characteristics of interactions between "stigmatized" persons and "normals" and characteristics of interactions among "stigmatized" persons. Following the lecturette, the total group is engaged in processing the experience in terms of the theory input.

Variations

I. A process observer may be assigned to the excluded group to make notes on the extent to which they develop cohesion. He might be sensitized to the cliche, "Misery loves company."

II. Excluded members can be designated by some object, such as hats, arm bands, special name tags. They may be asked to retain this designation throughout the continuing process of group life to ascertain if the excluding dynamics persist beyond the original experience.

III. Activities other than a refreshment break can be planned, such as playing energetic games or watching a movie in a different room.

IV. In step IV of the process, the spokesmen may assemble in the center rather than members of the excluded group. The excluded members could be told to wait on the side until the spokesmen complete their discussion.

V. After Step IV the small groups may be reassembled, with excluded members outside their circles. The excluded members are to break into these circles to re-include themselves. As soon as each excluded member has penetrated the circles, his group processes the exercise.

SYSTEM PROBLEMS: A DIAGNOSTIC ACTIVITY

Goals

To generate data about the functioning of an intact group or a growth group.

To diagnose the way a system approaches problem-solving.

Group Size

Two groups of at least five and not more than ten participants each. (This exercise is particularly useful with "natural" groups, such as families, task groups, and committees.)

Time Required

Approximately one hour.

Materials Utilized

I. System Problems Observation Form.

II. Pencils and paper.

Process

I. The facilitator pre-selects an assertive participant and briefs him privately. The participant is told that his task is to interrupt a discussion to inject a system problem in such a way as to require the group to deal with it. Examples:

1. In a task group, the problem may be his concern about low commitment, meeting times, lack of group goals, etc.
2. In a growth group, the participant may initiate problem-solving around artificiality, uneven participation, lack of directions, etc.
3. In a family group, such problems as vacation preferences, chores, allowances, etc., may be introduced.

It is essential that the "confederate" become committed to accomplishing his task. The facilitator will assist him in eliciting a group response.

II. The facilitator places one group in the center and the other into an outer circle. (The "confederate" is a member of the inner group.) System Problems Observation Forms are distributed to participants in the outer circle. While the observers are studying the form, members of the inner circle receive pencils and paper with which they are to make notes to themselves about a topic which the group will discuss. Suggested topics:

1. Task group: motivation, leadership style, rumors.
2. Growth group: first impressions, back-home application, openness.

3. Family group: powers of parents, house rules, discipline.

III. The facilitator participates in the inner group and initiates the discussion of the topic. After participants have become involved in the interchange, the facilitator "opens the gate" for the "confederate" to begin diverting the interaction toward the previously agreed-upon problem.

IV. When the problem is resolved or an impasse has been reached, the facilitator terminates the discussion and explains the strategy that he and the confederate used and the purposes of the intervention.

V. The facilitator asks the outer circle for process observations. Then the entire group forms one circle to talk through the experience. It is important for the facilitator to elicit comments on any feelings that participants have about being manipulated and to discuss with the group its approach to solving problems.

Variations

I. The facilitator may assign each member of the inner circle a role to play or an attitude to assume during the experience or direct each member to assume the role of another group member. For example, he could distribute role cards to each member with a brief instruction, such as "Be reticent," "Act hostile," "Concentrate on using listening and communication skills," "Be argumentative," "Be warm and receptive to the ideas of others."

II. Have more than one "confederate," each with a different system problem. In the processing phase, the behaviors of interveners can be discussed in terms of their relative influence in diverting the task.

System Problems Observation Form

I. Problem-Identification. How is the problem focused by the group? Who helps to define the issue?

II. Data-Generation. How are points of view about the problem brought out? Whose opinions are not included in the discussion?

III. Data-Processing. How are various positions discussed in relation to each other? Who is influential in exploring alternatives?

IV. Decision-Making. How is the problem resolved? Who influences the final decision?

V. Planning. How are "next steps" established? Who takes the responsibility for follow-through?

STRESS MANAGEMENT

GROUP EXPLORATION: A GUIDED FANTASY

Goal

To allow individuals to share their means of coping with fear and stress as well as their personal responses to pleasure.

Group Size

Six to twelve participants.

Time Required

Approximately one hour.

Materials Utilized

Construction paper, crayons, felt-tipped markers, or other art materials.

Physical Setting

Preferred: carpeted room in which participants can lie down and stretch out comfortably without restricting the space of others.

Process

I. The facilitator invites the group to participate in an exploratory trip. He asks them to make themselves as comfortable as possible and to close their eyes.

II. He explains that he will tell them what is happening on the trip and that they are to listen and fantasize their surroundings and experiences. He tells them that from time to time he will ask them questions. They are to answer these in their own minds, and they will be asked to answer them openly in the group when the experience is over.

III. The following script should be read slowly in a nonabrasive tone of voice:

"We have all gathered together to do down the Colorado River on a raft. We will be led by competent guides, but it will be rough. You must be prepared for a number of critical situations. It will be exciting and pleasurable, but at times it might be painful and dangerous. Contemplate this, consider it, and decide whether you want to go along. If you have some resistance, is there anyone in the group that convinced you to go? How does he or she do it? Do you convince someone else who is reluctant? How do you do it? Whom do you particularly want to go with you on this trip?"

"We gather in the boat, our guide at the helm. It is a beautiful day as we start down the river; it is calm and peaceful. In the warm sun, the boat smoothly moving through the waters, you find your mind wandering off. Catch the thought. What are you thinking about? What are you feeling? What reveries do you engage in?"

"The boat moves faster, and you see white waters ahead. You are a bit apprehensive, but soon you are in amidst the current. The raft is gently tossed about, but you come through smoothly and easily. This is your first taste of shooting the rapids. As you move down the river, with the cliffs becoming taller and taller on either side of the bank, you find the river moving faster and faster--the white waters becoming more turbulent. You learn that the rapids are rated on a scale from one to ten, and those that you have just gone through are rated two to three. They increase in force, and you are going through rapids rated six and seven. The raft is tossed about, but you cling, getting the excitement and the full taste of the thrill of the waters splashing around you--turning and twisting the raft. You come to a bend in the river, and your guide tells you that the next rapid is scaled ten, but because of the bend in the river it is possible for you to land before reaching the rapids and walk across a spot of land and regain the raft on the other side. You thus have a chance to get off. Do you do so, or do you go on? Do you have a moment of fear? Does anybody convince you to stay on? How? Do you convince anybody else to stay on? How?"

"You do go on. The raft is tossed, sometimes tilting at a forty-five degree angle. It turns so that you are going down backwards, then hits a rock and spins around again. Catch the feeling of the turmoil and note your feelings. The twisting and turning diminish. You are out of it and now are moving smoothly and quietly down the waters. What are you feeling?"

"Your guide tells you it is time now to rest and seek new adventures, and he lands the raft at the mouth of a blind canyon. He tells you that you will be there for a few hours and that you can explore the canyon. You move into it and find the tall cliffs on either side getting narrower and narrower above you until you are in the middle of a tunnel. It becomes darker and darker. How do you feel? You push on into the blackness, seeing no light behind you or ahead. Do you have any fears? What do you fear?"

"Suddenly light shines ahead, and you find yourself at the mouth of a large cave, which is well lighted. The cave is guarded by a gatekeeper, who informs you that there is a treasure within. Each of you has to supply a ticket of admission--something of yourself which you will give in order to enter the cave. Stop now, open your eyes, and with the material supplied make a ticket, giving something of yourself so that you can proceed."

IV. The facilitator distributes the art materials and allows the participants to draw, write, or in some way construct their "ticket".

V. He continues the fantasy:

"You offer your ticket to the gatekeeper and enter the treasure room. What is the treasure?"

"You enjoy your treasure, and then the gatekeeper tells you that you must go on, leaving the treasure behind. What do you feel? You pass out of the cave through a short tunnel and find yourself back on the beach, where your raft has been anchored. With surprise you look behind you and cannot see the crevice out of which you came. The cave is lost. How do you feel?"

"Night has now fallen. You see the sky above you up through the canyon; the stars are bright, and a warm breeze engulfs you. The river is flowing swiftly and quietly. You sit around a campfire, reflecting on your adventure, and you think back on all that took place during the day. What does it all mean to you?"

"We are now back to today. Here we are in this room. Let us review the answers in your mind."

VI. The facilitator asks various members the answers to each of the questions posed during the fantasy. When he reaches the subject of the ticket of admission, he asks participants to show, discuss, and interact with others concerning what they gave of themselves. The facilitator continues until all of the questions have been dealt with and ends by assisting the group in talking through the impact of the experience.

Variation

The facilitator may use any other fantasy which is appropriate to his paritcular group, perhaps emphasizing different emotional elements.

CLOSURE: DEBRIEFING

CLOSURE: VARIATIONS ON A THEME

Below are listed several ideas that are intended to be useful in closing human relations training events. They can also be employed for other purposes, such as fostering self-disclosure in personal growth groups. It is important to be sensitive to the amount of data which can be generated through some of the following exercises if used as "closure" experiences. Adequate time should be allocated for processing such data.

1. Becoming. Participants are given paper and pencils and are instructed to write their first names in large block letters on the top of the sheets. Then they are asked to complete the following sentence in as many ways as they can: "I am becoming a person who...." They mill silently, reading each other's sheets, then they leave.

2. Eye Contact Circle. The group stands in a circle, and one member goes around the circle in a clockwise direction, establishing eye contact and verbally communicating one-way with each person. He returns to his original place so that each member can tell him something. The design can be speeded up by having the second person follow the first around the circle, the third follow the second, and so on.

3. Nebulating. The group stands in a circle, arms around each other's shoulders. They gently sway back and forth, making eye contact with each other.

4. Contracts. Each participant makes a contract with one or more other persons that he will do a certain thing by a certain time. (Variation: he may write these down, with carbon copies for his own use.)

5. Mail Boxes. Participants are given packages of 3" x 5" cards on which they are to write final messages to each of the other group members. When all have finished, they write their first names on an extra card and take off their shoes, placing the name card in one shoe so that it can easily be read. Then they deliver their mail to the others, placing their cards in the empty shoes. They collect their mail, put on their shoes, and leave.

6. Symbolic Gifts. Group members verbally give each other fantasy gifts (objects, people, ideas) as a parting gesture. They may be asked to stand in front of the persons to whom they are giving gifts and to hold eye contact with them during the process.

7. Map of Life. On sheets of newsprint, participants draw maps of their lives, illustrating significant events. In an insert (such as is done with a more detailed map of a city on a state map) they draw a map of the current week, up to the here-and-now. Each member explains his map to the group.

8. *Think-Feel.* Participants are instructed to write on one side of a 3" x 5" card a sentence beginning with the phrase "Now I am thinking..." and on the other side a sentence starting with "Now I am feeling..." Then they are asked to interject their thoughts and feelings from both sides of their cards into a final discussion of the experience. The cards can be collected for evaluative data.

9. *Regrets.* Participants are asked to imagine leaving, getting into their cars, driving away, looking in their rearview mirrors back at the place they are leaving. They try to imagine what they would regret not having said before they left. Then they begin talking through what is left over or has not been said.

INDIVIDUAL DIFFERENCES

THE "T" TEST: AN EXPERIENTIAL LECTURE ON TRAITS

Goals

To introduce the concept of personality traits.

To illustrate the process of inferring characteristics from behavior.

To help diminish some of the unproductive anxiety which is often associated with filling out psychological instruments or inventions.

Group Size

Unlimited.

Time Required

Approximately thirty minutes.

Materials Utilized

I. Pencil and paper for each participant.

II. Newsprint and felt-tipped marker.

Physical Setting

Participants should be seated comfortably for writing. They should be able to see the display of group results.

Process

I. Without telling why, the facilitator announces that he is going to administer a test. He distributes pencils and paper and asks participants to get ready.

II. He tells participants the following: "For the next minute I want you to make as many T's on the sheet as you can. Make the letter T as many times as you can in one minute. Go!"

III. After one minute he says, "Stop! Now I want you to count the number of T's that you made and to write down that number."

IV. When all have finished counting, he determines the highest and lowest "score" and makes a distribution on the display chart. For example, if the highest score is 210 and the lowest score 64, he would make a chart like this:

Score Interval	Tally
201+	I
181 - 200	II
141 - 180	~~𝍸~~
121 - 140	~~𝍸~~ ~~𝍸~~ III
101 - 120	~~𝍸~~ ~~𝍸~~ ~~𝍸~~ ~~𝍸~~ ~~𝍸~~
81 - 100	~~𝍸~~ I
61 - 80	

V. He then asks, "What does this T-Test measure? It is obvious that, whatever is being measured, we don't all have equal amounts of it. "Participants call out ideas about the constructs that may explain the individual differences in T-making behavior. All of these ideas are posted.

Following is a typical list of what participants hypothesize to be measured in the test:

---eye-hand coordination
---dexterity
---ability to follow directions
---creativity
---competitiveness
---T-making behavior
---anxiety
---quickness
---achievement need
---compulsiveness

VI. The facilitator initiates a discussion of the validity of the "test" (what is presumably measured by the procedure) with the participants. He leads toward a treatment of the concept of traits, which are arbitrary labels devised by psychologists to "explain" behavior by hypothesizing linear continua within people.

VII. The facilitator begins to explore the meaning of traits from a conceptual point of view. The facilitator points out that the responses offered by the group are trait-terms. In the list shown above each of the terms is generally considered a trait name, with the exception of "ability to follow directions," "eye-hand coordination," and "T-making behavior." Next the facilitator offers the following definition of traits: "Traits are sets of categories invented by behavioral scientists to permit the orderly description of behavior." From this definition a short discussion may be centered around the idea that traits do not exist in and of themselves in the person, there is no part of the individual that houses compulsiveness, for example. Rather, individuals respond to stimuli. Behaviors are elicited from individuals. The person who constructs tests calls traits into being--invents them--in an attempt to help describe behavior and classify it within meaningful categories.

In calling a trait into being, the test-constructor or theorist must define his trait. He does this at two levels--theoretical and operational.

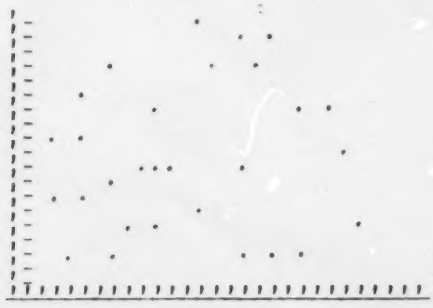
A. Theoretical Level: the theoretical definition of a trait generally consists simply of the sets of words used to describe the trait. In the "T" test, for example, one trait name generated by the participants was that of "competitiveness." A theorist interested in the study of "competitiveness is the motivation for a person to enter a structured task with the objective of out-performing all other persons engaged in the task."

B. *Operational Level:* With the above theoretical definition, it is necessary to develop some set of operations--an operational definition of the trait--in order to enable persons to respond behaviorally in such a way that the trait can be assessed. In the "T" test, the set of operations is the actual reproduction of T's on a piece of paper which merely consists of the specific behaviors employed to do the task. In and of themselves such behaviors have little meaning. However, when the term "competitiveness" is invented and defined, one must then elicit and measure corresponding behaviors.

Variations

I. Ask participants to record their reactions to the instructions immediately after the test, before scoring. (This should heighten the participation in the brain-storming of constructs.)

II. Correlate the "scores" with some demographic characteristics of the participants. For example, tally men and women separately, or plot scores against age in a scatter diagram, such as follows:



COMMUNICATION

BALL GAME: CONTROLLING AND INFLUENCING COMMUNICATION

Goals

To explore the dynamics of assuming leadership in a group.
To increase awareness of the power held by the member of a group who is speaking at any given time.
To diagnose communication patterns in a group.

Group Size

Six to twelve participants. Several groups may be directed simultaneously.

Time Required

Approximately thirty minutes.

Materials Utilized

A ball or other convenient object for each group.

Process

I. *The facilitator explains that in the following discussion session, the manner in which the participants will interact will be limited. He tells them that possession of the ball (or other object) that he is holding will determine who may speak. He further explains that the participant with the ball must keep it until someone signals nonverbally that they wish to have it. The individual holding the ball may refuse to give it to a member who requests it.*

II. *If process observers are used, they are selected and briefed.*

III. *The facilitator announces a topic for the group to discuss, based upon the goals and experiences of the group. It is important to ensure that significant interation will be generated. (Examples: silent members, expressing negative feedback, barriers to doing one's job, reactions to the training session so far.)*

IV. *The facilitator hands the ball to a participant, indicating that the discussion period is to begin.*

V. *After fifteen minutes have passed, the facilitator indicates that the discussion is over.*

VI. *The group processes the experience in terms of the power phenomena that emerge in reference to the holder of the ball, frustrations involved in attempting to gain or hold this power, and the patterns of communication that emerge during the experience.*

VII. *If process observers have been used, the facilitator asks them to provide feedback for the group.*

COMMUNICATION GROUP PROCESSES

THE GIFT OF HAPPINESS: EXPERIENCEING POSITIVE FEEDBACK

Goals

To promote a climate of trust, self-worth, and positive reinforcement within a small group.

To experience giving and receiving positive feedback in a non-threatening small group.

Group Size

Six to ten participants who have had some experience together as a group.

Time Required

Approximately five minutes per participant and about thirty minutes for processing.

Materials Utilized

Pencils and paper.

Physical Setting

Tables or desk chairs (if not available, use lapboards or other writing surfaces). Participants should be located around the room so that a sense of privacy is preserved while writing.

Process

I. The facilitator distributes pencils and paper. Each participant receives enough paper to write a message to each other member of the group.

II. The facilitator makes a statement such as the following: "It is often possible to enjoy a small gift more than a large one. Yet, we sometimes become so concerned about not being able to do great things for each other that we neglect to do the little things that can also be very meaningful. In the following experience we will all be giving a small gift of happiness to each person in this group."

III. The facilitator then invites each participant to write on a slip of paper a message to each other member of the group. The messages are intended to make that person feel positive about himself.

IV. The facilitator recommends several possible approaches to giving positive feedback so that participants can find appropriate means of expression even for individuals whom they do not know well or do not feel close to. He may tell the participants to:

1. Try to be specific: say, "I like the way you smile at everyone when you arrive," rather than, "I like your attitude."
2. Write a special message to fit each person rather than a comment that could apply to several persons.

3. Include every participant, even if you are not too well acquainted with them. Choose whatever it is about the person that you respond to most positively.

4. Try telling each person what you have observed as his real strength or notable success in the group, why you would like to know him better, or why you are glad to be in the group with him.

5. Make your message personal: use the other person's name, state your message in the first person, and use such terms as "I like," or "I feel."

6. Tell each person what it is about him that makes you a little happier. (The facilitator may wish to distribute or post such guidelines.)

V. Participants are encouraged to sign their messages, but they are given the option of leaving them unsigned.

VI. After each message is finished, the facilitator asks the participants to fold it once and place the name of the recipient on the outside. He asks them to distribute their messages to a place designated by each participant as his "mailbox."

VII. When all messages have been delivered, the facilitator invites participants to share the feedback that was most meaningful to them, to clarify any ambiguous messages, and to express the feelings they have experienced during the process.

Variations

I. Participants may be permitted to send messages only to those persons toward whom they have significant positive feelings.

II. The content can be changed to negative feedback. One alternative is to have two phases, one positive and the other negative. The order of the phases can be reversed.

III. Participants can be focused on one at a time. The other members can write messages to an individual while he is predicting what feedback he will receive.

IV. The process can be generalized to include almost any content. Examples: "What I can't say to you is...." "You are the (superlative adjective) person in this group." "I want you to...," "I rank you ____ in closeness to me in this group because..."

V. Actual gifts may be exchanged as symbolic feedback. Participants can be instructed to bring to the session a personal gift that is significant to them. They may also be asked to leave the meeting to find symbolic gifts, such as flowers, stones, leaves, books, pictures, etc.

COMMUNICATION PROBLEM SOLVING

SHOE STORE: GROUP PROBLEM-SOLVING

Goals

To observe communication patterns in group problem-solving.
To explore interpersonal influence in problem-solving.

Group Size

Teams of four to five members each. Any reasonable number of small groups may be accomodated.

Time Required

Thirty to sixty minutes, depending upon the sophistication and history of the groups.

Materials Utilized.

Paper and pencils (optional).

Physical Setting

Rooms large enough to accommodate groups, with minimal noise interference.

Process

I. The facilitator explains to the group that they are about to perform a group task in solving a mathematical problem. He tells them that they are to arrive at consensus; that is, each member of the group must at least agree somewhat with the conclusion that has been reached by the group. Members are urged to pay attention to how the group arrives at the conclusion, so that they can later discuss the process that emerges.

II. He then states the problem as follows: "A man went into a shoe store to buy a twelve-dollar pair of shoes. He handed the clerk a twenty-dollar bill. It was early in the day, and the clerk didn't have any one-dollar bills. He took the twenty-dollar bill and went to the restaurant next door, where he exchanged it for twenty one-dollar bills. He then gave the customer his change. Later that morning the restaurant owner came to the clerk and said, "This is a counterfeit twenty-dollar bill!" The clerk apologized profusely, and took back the phoney bill and gave the restaurant owner two good ten-dollar bills. Not counting the cost of the shoes, how much money did the shoe store lose?" (Answer: $8.00)

(The facilitator may wish to hand out copies of this problem statement, or he may present it on a poster.)

III. When the groups arrive at a conclusion, they raise their hands, and the facilitator goes to them to ask if all are in agreement. He then asks one member to explain the process of arriving at the conclusion.

IV. The process continues until all teams have arrived at the correct answer. Groups who find the answer early may be asked by the facilitator to observe other groups, but they should be cautioned not to intervene in the problem-solving in any way.

V. The facilitator discusses the communication issues by focusing on such behaviors as the following:

1. Reacting negatively to the phrase "mathematical problem" and establishing artificial constraints.
2. Leaving the problem-solving to "experts" (self-proclaimed or otherwise).
3. Adopting pressuring tactics in reaching consensus.
4. Revealing anxiety feelings generated by observing groups who had reached the correct conclusion early.
5. Using "teaching aids" in convincing others (scraps of paper, paper and pencil, real money).
6. Feeling distress if a wrong conclusion is reached.
7. Using listening checks and other communication-skills techniques.
8. Refusing to set aside personal opinion in order to reach consesus.

VI. The facilitator may also wish to discuss the patterns of communication which were reflected in the experience. He may comment on influence behaviors, any tendencies toward one or two-way communication modes, personal or group issues which interfered with task accomplishment, and behaviors that facilitated or were counter-productive to communication.

Variations

I. A ground rule may be established that groups may use no audio-visual aids. They would have to talk through the solution.

II. The problem-solving phase could begin by having individual members attempt to solve the problem independently first, before the group meeting.

III. The problem-solving discussion could be carried out via "mail" by supplying members with decks of paper slips on which they write several rounds of letters to each other. A consensus might emerge through this method, which simulates organizational problem-solving through correspondence.

IV. The problem could be acted out rather than explained orally. The skit could be videotaped so that it can easily be replayed after the consensus-seeking phase.

PROBLEM SOLVING

FORCE-FIELD ANALYSIS: INDIVIDUAL PROBLEM-SOLVING

Goals

To study dimensions of problems and to devise strategies for solving them through diagram and analysis.

To experience the consultative role.

Group Size

Unlimited number of triads.

Time Required

Approximately two and one-half hours.

Materials

I. Copies of the Force-Field Analysis Inventory for all participants.

II. Pencils.

Physical Setting

A room large enough so that triads may carry on a discussion without distracting other triads. A writing surface for each participant.

Process

I. The facilitator distributes a Force-Field Analysis Inventory and a pencil to each participant.

II. The facilitator announces that participants have thirty minutes to complete parts I and II of the inventory.

III. When everyone has finished parts I and II, the facilitator introduces part III with a lecturette on planned change and Lewinian Force-Field Analysis. He may wish to make the following points:

In planning specific changes to deal with a problem, one should be aware that increasing the driving forces to change the status quo also produces increased tension. One should also be aware that whatever change in status quo has been accomplished will be lost if the driving force is reduced. A change in the status quo, then, can best be accomplished by reducing the strengths of the restraining forces while maintaining the force of the drive. If the driving forces are not maintained, the tension will be reduced without any change in the status quo.

IV. The facilitator directs participants to work for about ten minutes on part III. (They may not complete this task in the allotted time, but the next step does not require its completion.)

V. Participants are instructed to select two others with whom they feel comfortable in working on their problems. These triads are seated so that they do not distract each other.

VI. Three rounds of consultation are begun. In three thirty-minute periods, each member of the triad, in turn, plays the role of a consultant, then a client, and then a process observer. In each period, twenty minutes is allotted for consultation and ten minutes for feedback to the consultant.

VII. Triads process the entire experience.

Variations

I. The activity can be carried out privately, in dyads, or in groups. In a work group members can jointly analyze a problem.

II. The consulting triads design can be used with other problems-analysis models.

III. The inventory can be used as an interview guide for consultation with a client.

FORCE-FIELD ANALYSIS*
(A Problem-Solving Process)

Problem Specification:

The specific problem is _____

_____

_____

_____

In order to solve this problem we must:

1. identify forces which (a) facilitate change of the existing equilibrium and (b) hinder change towards a more satisfactory norm.

2. evaluate the importance of each of these forces; and

3. identify strategies for decreasing the strength of forces which hinder change towards a more satisfactory norm.

Procedure:

1. Group Formation: Form groups of four. Each group should select a secretary.

2. Brainstorming Session: The purpose of the brainstorming session is to generate an extensive list of forces which facilitate and forces which hinder changes toward a solution of the problem.

   a. Ground rules:

      (1) there will be no criticism or evaluation of ideas suggested during the session;

      (2) far out ideas are to be encouraged as they may trigger other, more practical ideas for someone else; and

      (3) quantity is desired; the more ideas generated, the better.

   b. Identifying Facilitating and Hindering Forces

      Each group should fill out Forms I and II.

*NTL materials from the work of Kurt Lewin

PRINCIPLES FOR "BRAINSTORMING" - THE PRODUCTION OF ALTERNATIVE IDEAS

1. You will be more productive of ideas if you refrain from evaluating them or discussing them at the time they are proposed. This is important because education and experience have trained most of us to think judicially rather than creatively. By deferring judgment on our ideas, we can think up far more alternatives from which later to choose.

2. Group production of ideas can be more productive than separate, individual production of ideas. Experiments in group thinking have demonstrated that the average participant in this kind of creative collaboration can think up twice as many possible solutions as when working alone.

3. The more ideas we think up the better. In problem-solving of almost any type, we are far more likely to choose the right path toward solution if we think up 10 ideas by way of possible alternatives instead of only two or three.

****

PROCEDURES FOR "BRAINSTORMING"

First Phase: BRAINSTORM according to the following rules:

a. All critical judgment is ruled out. We seek ideas, not critical analysis.

b. Wild ideas are expected in the spontaneity which comes when we suspend judgment. Practical considerations are not of importance at this point.

c. Quantity of ideas counts here, not quality.

d. Build on the ideas of other brainstormers when possible. Pool your wildness.

Second Phase: Now CRITICAL JUDGMENT is applied:

a. Members should review the ideas by applying their best judgment.

b. Members should be urged to seek for clues to something sound in the wildest ideas.

c. Priorities should be selected for reporting to the decision-making person or group.

FORM I

FORCES PROVIDING THRUST TOWARD CHANGE

If we consider the existing equilibrium as being a balance of opposing forces, what forces do you see providing thrust toward change?

___ (a) _____

___ (b) _____

___ (c) _____

___ (d) _____

___ (e) _____

___ (f) _____

___ (g) _____

___ (h) _____

___ (i) _____

___ (j) _____

FORM II

FORCES HINDERING OR PROVIDING A COUNTER-THRUST TO CHANGE

What forces do you find hindering the application of a suitable solution to the problem?

____ (a) _____

____ (b) _____

____ (c) _____

____ (d) _____

____ (e) _____

____ (f) _____

____ (g) _____

____ (h) _____

____ (i) _____

4. Strategy for Changing the Equilibrium

a. Goal: Working in groups of four, suggest strategies for decreasing the strength of three forces inhibiting finding and applying a solution to the problem.

b. Procedure: Divide a piece of paper in half. On the left hand side list three forces identified on Form II which inhibit finding and applying a solution to the problem. On the right hand side propose three ways the strength of these forces can be weakened.

FORCES INHIBITING FINDING AND APPLYING A SOLUTION TO THE PROBLEM	SUGGESTIONS FOR COUNTERACTING THESE FORCES

3. Evaluation Session

a. Weigh the Strength of Forces Both Pushing for and Inhibiting Finding a Solution to the Problem.

In the spaces to the left of the letters on Forms I and II, weigh the strength of each force identified on a range of from one to five in the following manner:

(1) it has almost nothing to do with the thrust toward (against) change in the problem;

(2) it has relatively little to do with the thrust toward (against) change in the problem;

(3) it is of moderate importance in the thrust toward (against) change in the problem;

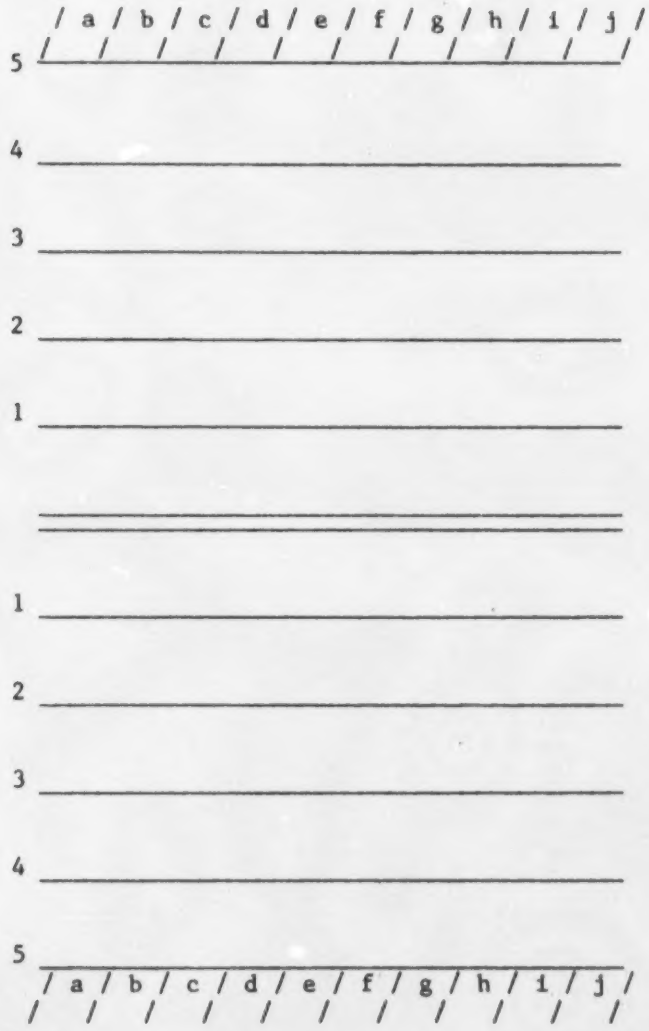
(4) it is an important factor in the thrust toward (against) change in the problem;

(5) it is a major factor in the thrust toward (against) change in the problem.

b. Diagraming the Forces Pushing for and Inhibiting Change

Diagram the forces of thrust and counter-thrust quantified in question a by drawing an arrow from the corresponding degree of force to the equilibrium line. For example, if you considered the first on your list of forces on Form I to be rated a 3, draw your arrow from the 3 position in the left-hand column of numbers indicating thrust up to the equilibrium line.

Forces Inhibiting
Change



Forces Pushing-for
Change

The completed diagram helps you identify the relative strength of the forces hindering finding and applying a satisfactory solution to the problem. In order to raise the equilibrium, you must adopt strategies which help to reduce the strength of the strongest forces while at the same time maintaining or increasing the strength of the forces pushing for change. By decreasing the strength of the hindering forces alone, the equilibrium will float upward of its own accord, so this would appear to be the place to begin your attack on the existing norm equilibrium.

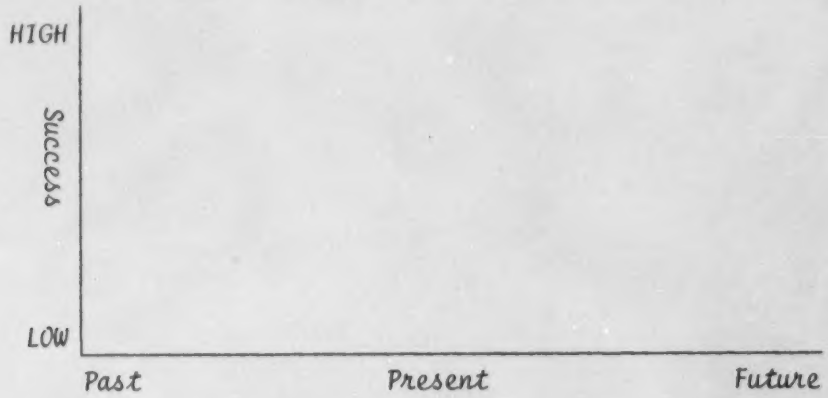
FORCES INHIBITING FINDING AND APPLYING A SOLUTION TO THE PROBLEM	SUGGESTIONS FOR COUNTERACTING THESE FORCES

PERSONAL DEVELOPMENT

Part I: Where Am I Now?

1a. Using the pattern of a business progress chart, draw a line that depicts the past, present, and future of your career.

CAREER

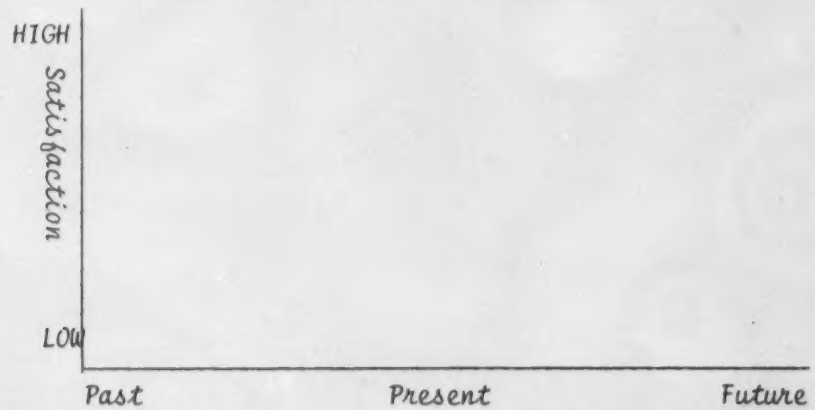


1b. Write a brief explanation of the career line you have drawn.

1c. When the other members of your triad have finished this portion, share these data.

2a. Draw a line that depicts the past, present, and future of your personal affiliations (family and friends.)

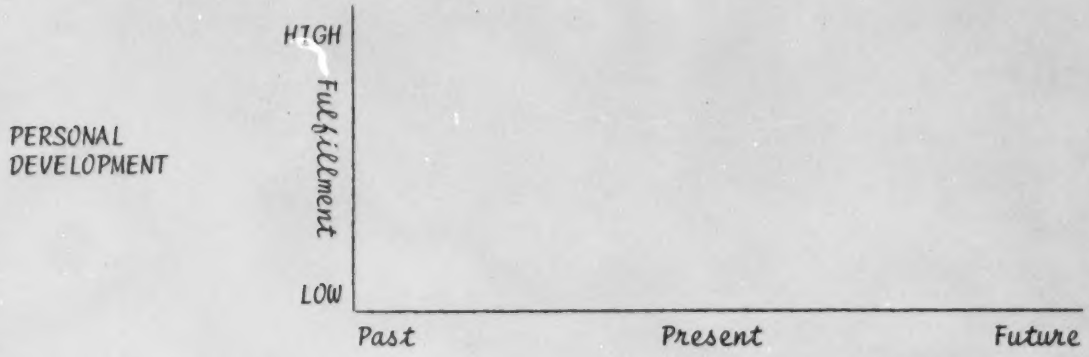
PERSONAL AFFILIATIONS



2b. Write a brief explanation of the affiliation line you have drawn.

2c. As soon as the other members of your triad have finished this portion, share the data.

3a. Draw a line that depicts the past, present, and future of your personal development. (Consider every level from personal growth to material acquisition.)



3b. Write a brief explanation of the personal development line you have drawn.

3c. As soon as the other members of your triad have finished this portion, share these data.

4. On this page list twenty adjectives which describe yourself most accurately in regard to your career.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

5. On this page list twenty adjectives which describe yourself most accurately in regard to your personal affiliations.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

15. _____

16. _____

17. _____

18. _____

19. _____

20. _____

6. On this page list twenty adjectives which describe yourself most accurately in regard to your personal development.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

7. Regroup your career list of adjectives into the following categories.

Positive	Neutral	Negative

Share these lists with your triad.

8. Regroup your personal affiliations adjectives.

Positive	Neutral	Negative

Share these lists with your triad.

9. Regroup your personal development adjectives:

Positive	Neutral	Neutral
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Share these lists with your triad.

PART II: WHERE DO I WANT TO BE?

1. What is your conception of ideal attainments in your career? Be as free as possible in selecting these goals. Summarize them below. Example: 1. I want to become president of my company.

_____ 1. _____

_____ 2. _____

_____ 3. _____

_____ 4. _____

_____ 5. _____

_____ 6. _____

_____ 7. _____

_____ 8. _____

_____ 9. _____

_____ 10. _____

2. What is your conception of ideal attainments in your personal affiliations? Be as free as possible in selecting these goals. Summarize them below. Example: 1. I want to behave so that my mother-in-law will better accept me.

_____ 1. _____

_____ 2. _____

_____ 3. _____

_____ 4. _____

_____ 5. _____

_____ 6. _____

_____ 7. _____

_____ 8. _____

_____ 9. _____

_____ 10. _____

3. What is your conception of ideal attainments in your personal development? Be as free as possible in selecting these goals. Summarize them below. Example: 1. I want to learn to fly an airplane.

_____ 1. _____

_____ 2. _____

_____ 3. _____

_____ 4. _____

_____ 5. _____

_____ 6. _____

_____ 7. _____

_____ 8. _____

_____ 9. _____

_____ 10. _____

4. Using the following four-point scale, assign a value to each of your career goals by writing the appropriate number in front of each goal you listed in Item II-1.

   1. Of little importance

   2. Of moderate importance

   3. Of great importance

   4. Of very great importance

5. Using the preceding four-point scale, assign the appropriate value to each of the personal affiliation goals you listed in item II-2.

6. Using the four-point scale above, assign the appropriate value to each of the personal development goals you listed in item II-3.

7. Share and discuss all your priority values with the other members of your triad. You may modify your value ratings if you wish.

8. Make a combined list of all your goals in items II-1, II-2, and II-3. This should reflect the relative importance of your specific goals. (You may find it convenient to abbreviate your goal descriptions.)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____

PART III. HOW DO I GET TO WHERE I WANT TO BE?

1. From your preceding combined list of goals, select at least three for detailed planning. Establish a program, with specific steps and deadlines, for attaining each of these objectives.

2. Establish written contracts with the other members of your triad for attaining these goals.

3. From your combined list, choose at least three additional goals and establish a programmed schedule for each.

4. Make definite plans to establish written contracts with persons not in your triad for attaining this second set of goals.